

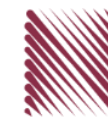


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, August 17th 2023



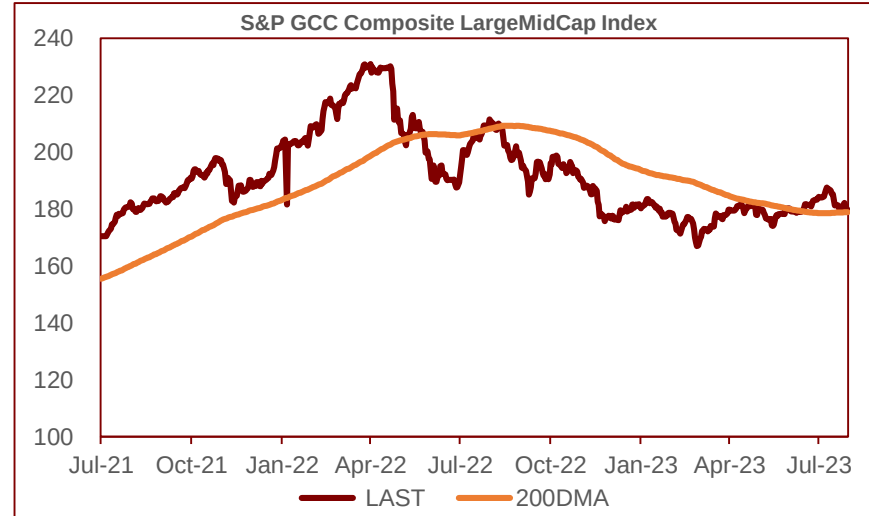


Market Watch

Thursday, August 17, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,451.31	0.51	0.24	-2.06	-0.07	9.28	11,534 SAR	1.97	18.14
Qatar (QE Index)	10,571.63	-0.86	-1.53	-3.57	4.93	-1.02	558 QAR	1.38	12.56
Dubai (DFMGI)	4,050.59	0.09	0.01	-0.25	6.78	21.37	579 AED	1.59	21.77
Abu Dhabi (ADI)	9,800.65	-0.03	-1.28	-0.09	2.38	-4.24	1,435 AED	1.82	20.17
Bahrain (BAX)	1,952.63	-0.38	-1.00	-1.61	-0.27	3.03	9 BHD	2.07	18.00
MUSCAT SE INDEX	4,785.26	0.40	0.59	0.19	0.36	-1.49	5 OMR	0.99	13.25
SP GCC Comp LMC	180.17	0.23	-0.40	-2.88	0.60	0.73			
SP UAE PRICE INDEX	139.98	0.02	-1.13	-1.23	3.90	1.52			
Developed Markets									
MSCI World Index	2,897.50	-0.81	-2.78	-5.30	-2.19	11.49			
U.S. (S&P 500)	4,369.71	-0.77	-2.20	-4.76	-1.80	13.83			
U.K. (FTSE 100)	7,262.43	-0.63	-4.05	-5.05	-2.94	-1.90			
Japan (Topix)	2,237.29	-0.34	-2.19	-2.99	-1.55	19.10			
Emerging Markets									
MSCI EM Index	964.44	-0.19	-3.42	-6.98	-1.58	1.83			
China (SSE Composite)	3,131.95	0.43	-2.79	-3.87	-1.20	2.41			
India (Sensex)	64,948.66	-0.59	-0.82	-2.07	0.67	7.08			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,124.00	0.05	-0.33	-1.79	1.34	-2.31	46.02 KWD	1.61	21.36
Kuwait Premier Index	7,823.53	0.01	-0.47	-2.94	0.18	-3.60	35.50 KWD	1.56	20.54
Kuwait Main Index	5,792.99	0.20	0.19	2.89	6.03	3.51	10.52 KWD	1.76	24.14
NIC 50	9,294.93	1.96	-0.48	-2.95	0.17	2.32	28.60 KWD	1.54	19.54
Kuwait Sector									
Banking	1,733.13	-0.01	-0.47	-2.03	1.60	-3.39	29.15 KWD	1.16	21.54
Telecom	1,105.80	0.18	0.50	-0.69	-1.04	-6.40	3.39 KWD	1.35	8.88
Industrials	973.20	-0.54	-1.47	-2.82	-2.98	-9.80	3.44 KWD	0.84	18.52
Financial services	1,274.74	0.61	-0.06	-1.21	3.89	1.39	3.67 KWD	0.78	31.39
Real estate	1,232.71	-0.32	-0.07	-1.39	2.09	1.99	2.67 KWD	0.62	26.25
Basic materials	854.19	-0.34	0.41	-3.27	-5.86	-1.26	0.76 KWD	1.99	9.69
Health care	478.19	3.27	4.98	5.26	6.40	3.54	0.24 KWD	1.00	11.42
Consumer services	611.06	0.34	8.12	-1.70	-0.66	27.32	0.79 KWD	0.94	13.13
Insurance	2,226.60	0.06	1.34	2.18	5.53	43.58	0.91 KWD	0.90	10.23
Consumer Disc	1,669.83	0.78	-1.55	-2.97	7.04	12.31	0.19 KWD	1.14	38.50
Energy	987.83	1.56	-2.11	-1.11	-3.09	-13.24	0.21 KWD	0.71	4.41
Technology	566.72	-2.01	-4.88	-1.77	-16.15	-18.60	0.01 KWD	0.70	0.00
Utilities	510.53	0.00	0.00	-3.96	-3.00	3.19	0.21 KWD	1.95	15.89



What Move the GCC markets

Oil Prices

Oil prices rose about 1% on Thursday on signs of slowing U.S. output, but both crude benchmarks also ended their longest weekly rally of 2023 on mounting concerns about global demand growth, Brent crude futures rose 68 cents, or 0.8%, to settle at \$84.80 a barrel.

Kuwait Market

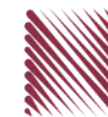
The market closed up by + 0.05% at 7,124.0 value traded 28.0 million KD, Premier market value reached 21.9 million KD up + 0.01% at 7,823.53

KSA Market

The market closed up today by + 0.51% at 11,451.31

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



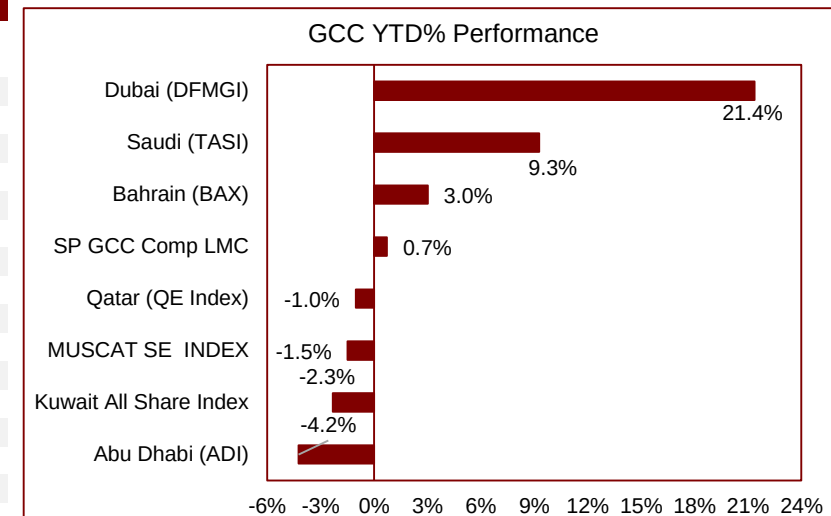
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.934	0.11	0.43	-2.91	-0.11	-9.03	7.41 KWD	1.80	27.00
KFH	0.757	0.00	-1.05	-4.06	1.61	1.18	11.18 KWD	1.93	32.00
Zain	0.514	0.00	-0.19	-1.34	-0.77	-8.70	2.22 KWD	1.73	10.96
BOUBYAN BANK	0.622	0.00	-0.32	0.32	-2.81	-17.38	2.47 KWD	2.55	34.00
Agility	0.614	-0.81	-2.69	-2.54	-1.44	-14.72	1.64 KWD	0.83	22.79
Saudi Arabia									
ARAMCO	35.05	1.74	3.09	8.18	8.68	20.11	8,481.87 SAR	5.55	16.76
SABIC	86.50	0.12	-0.92	0.93	-1.93	-3.24	259.49 SAR	1.47	35.00
STC	40.65	0.25	-1.81	-4.13	-6.55	11.07	203.24 SAR	2.68	16.30
AL-RAJHI BANK	73.00	0.97	1.39	-2.14	0.00	-2.93	291.99 SAR	2.83	16.96
NCB	35.50	1.14	-1.39	-7.91	-3.53	-5.81	212.99 SAR	1.24	11.11
United Arab Emirates									
ETISALAT.AD	20.96	-0.66	-5.16	-6.43	-6.43	-8.31	206.60 AED	5.10	21.10
FAB.AD	13.90	0.00	-2.80	-5.05	1.91	-18.71	153.99 AED	1.32	11.78
EMIRATES NBD	16.95	0.89	3.99	-0.29	14.14	30.38	106.74 AED	1.08	5.50
DB ISLAMIC BK	5.61	-0.36	-2.60	-2.43	2.56	-1.58	40.91 AED	0.98	7.47
EMAAR PROPERT	6.79	-0.29	-0.88	0.44	5.93	15.87	59.92 AED	0.84	7.60
Qatar									
QNB	16.22	-1.10	-2.05	-4.48	5.19	-9.89	149.81 QAR	1.45	10.87
INDUSTRIES QAT	13.00	-1.14	-3.70	-2.48	15.76	1.48	78.65 QAR	2.10	14.38
QA ISLAMIC BK	20.10	-0.05	-0.74	-4.96	13.50	8.30	47.49 QAR	1.72	12.00
MASRAF AL RAYA	2.44	-1.97	-2.13	-2.79	-4.80	-23.05	22.69 QAR	0.95	21.88
MESAIEED PETRO	1.91	-0.78	-0.93	-2.00	0.58	-10.16	24.01 QAR	1.45	18.27
OMAN									
BANK MUSCAT	0.281	-0.35	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.019	14.75	1.90	2.41	2.72	10.76	0.76 OMR	1.22	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.298	0.00	1.36	3.11	6.43	3.11	0.48 QAR	0.74	12.71
OMINVEST	0.384	1.05	1.05	-1.29	1.59	-8.57	0.26 QAR	0.86	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-August 23	24.42%	15.0%	0.07%	2.09%	0.24%	5.07%	17.57%	13.68%	6.14%	4.54%
16-August 23	24.40%	15.02%	0.07%	2.19%	0.24%	5.10%	17.55%	13.62%	6.15%	4.63%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.05 %The leading sector best performance indices today are Health care 3.27 % Energy 1.56 % Consumer Disc 0.78 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.74 %, SABIC has a positive performance today by + 0.12 %, STC has a positive performance today by + 0.25 %, Al Rajhi Bank has a positive performance today by + 0.97 %.

U.A.E

ETISALAT .AD has a negative performance today by - 0.66 %, FAB.AD has a flat performance today.



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw