



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, July 17th 2023





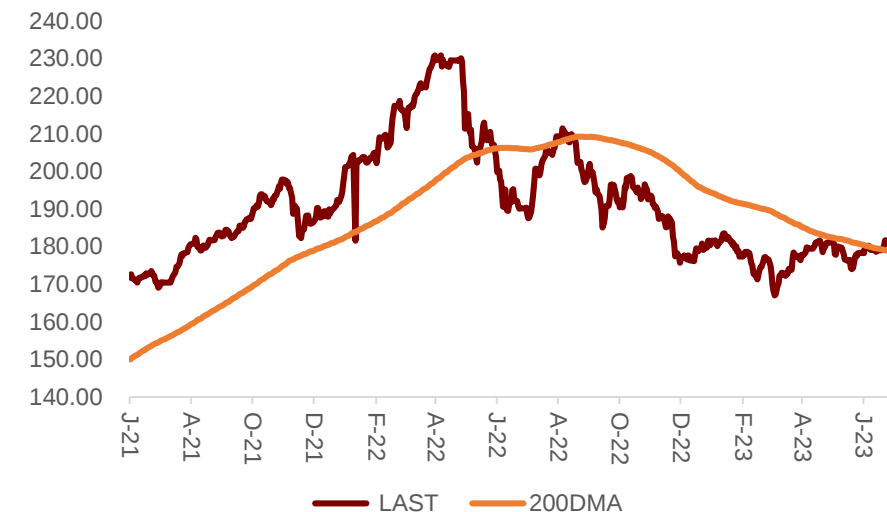
Market Watch

Monday, July 17, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,780.27	0.55	0.62	2.80	2.80	12.42	11,018 SAR	2.11	19.08
Qatar (QE Index)	10,280.37	0.54	0.62	2.04	2.04	-3.75	544 QAR	1.40	11.43
Dubai (DFMGI)	4,018.95	0.23	0.36	5.99	5.99	20.47	579 AED	1.55	18.72
Abu Dhabi (ADI)	9,681.15	0.10	0.56	1.37	1.37	-5.19	1,435 AED	1.84	21.31
Bahrain (BAX)	1,980.36	0.04	0.29	1.15	1.15	4.49	9 BHD	7.29	18.00
MUSCAT SE INDEX	4,757.65	-0.25	-0.81	-0.22	-0.22	-2.05	5 OMR	1.00	13.25
SP GCC Comp LMC	183.82	0.34	0.43	2.69	2.69	2.82			
SP UAE PRICE INDEX	139.08	0.16	0.77	3.52	3.52	1.15			
Developed Markets									
MSCI World Index	3,021.96	0.13	0.07	1.86	1.86	16.11			
U.S. (S&P 500)	4,522.79	0.39	0.28	1.63	1.63	17.80			
U.K. (FTSE 100)	7,406.42	-0.38	-0.45	-1.66	-1.66	-0.61			
Japan (Topix)	2,239.10	0.00	-0.17	-2.16	-2.16	18.36			
Emerging Markets									
MSCI EM Index	1,027.77	-0.07	0.71	3.87	3.87	7.46			
China (SSE Composite)	3,209.63	-0.87	-0.83	0.24	0.24	3.90			
India (Sensex)	66,589.93	0.80	1.57	2.89	2.89	9.45			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,287.09	-0.27	-0.36	3.66	3.66	-0.07	47.01 KWD	1.78	18.65
Kuwait Premier Index	8,118.90	-0.11	-0.28	3.96	3.96	0.04	36.77 KWD	1.73	18.58
Kuwait Main Index	5,596.49	-0.92	-0.72	2.43	2.43	-0.01	10.24 KWD	1.97	18.92
NIC 50	9,116.27	0.00	-0.29	3.95	3.95	0.36	28.60 KWD	1.71	17.58
Kuwait Sector									
Banking	1,771.26	-0.43	-0.73	3.84	3.84	-1.26	29.72 KWD	1.26	19.58
Telecom	1,146.47	-0.76	-0.16	2.60	2.60	-2.96	3.52 KWD	1.41	9.15
Industrials	1,035.48	0.12	0.07	3.23	3.23	-4.02	3.65 KWD	0.81	20.70
Financial services	1,297.38	0.68	1.11	5.74	5.74	3.19	3.75 KWD	0.77	19.44
Real estate	1,237.47	0.45	0.51	2.48	2.48	2.38	2.68 KWD	0.62	22.77
Basic materials	902.51	-1.17	0.02	-0.54	-0.54	4.32	0.79 KWD	1.42	8.84
Health care	455.49	0.33	1.14	1.35	1.35	-1.38	0.23 KWD	0.95	6.68
Consumer services	614.05	-0.39	0.05	-0.17	-0.17	27.94	0.83 KWD	0.88	14.21
Insurance	2,103.87	0.12	0.28	-0.29	-0.29	35.66	0.87 KWD	0.76	10.19
Consumer Disc	1,683.65	-1.17	-1.96	7.92	7.92	13.24	0.19 KWD	1.11	0.00
Energy	993.36	-1.21	-0.75	-2.55	-2.55	-12.75	0.21 KWD	0.75	4.61
Technology	614.01	-0.35	2.80	-9.15	-9.15	-11.81	0.01 KWD	0.76	0.00
Utilities	528.95	-0.98	-0.49	0.50	0.50	6.91	0.22 KWD	2.02	16.46

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged higher in early trade on Tuesday after sinking in the previous session on weaker-than-expected Chinese economic growth, as investors eyed a possible tightening of U.S. crude supplies. Brent crude gained 11 cents to \$78.61 a barrel.

Kuwait Market

The market closed down by -0.27% at 7,287.09 value traded 56.1 million KD, Premier market value traded reached 46.3 million KD down -0.11% at 8,118.90

KSA Market

The market closed up today by 0.55% at 11,780.27

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



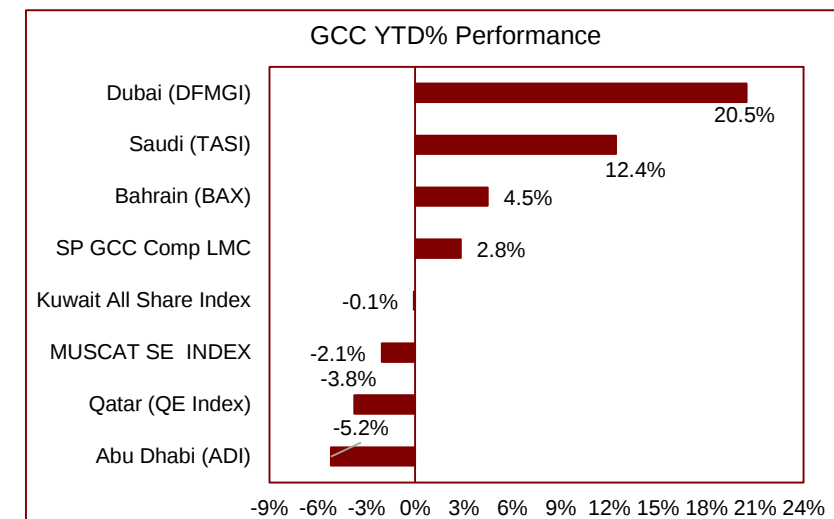
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.978	-0.10	-0.10	4.60	4.60	-4.74	7.77 KWD	1.96	27.00
KFH	0.775	-0.13	-0.77	4.03	4.03	3.58	11.46 KWD	1.97	32.00
Zain	0.530	-0.75	-0.56	2.32	2.32	-5.86	2.30 KWD	1.79	11.30
BOUBYAN BANK	0.650	-0.61	-0.76	1.56	1.56	-13.66	2.58 KWD	2.90	34.00
Agility	0.657	0.15	-0.15	5.46	5.46	-8.75	1.76 KWD	0.92	23.68
Saudi Arabia									
ARAMCO	32.30	0.47	0.47	0.16	0.16	10.69	7,809.10 SAR	5.24	13.84
SABIC	87.00	-1.36	-1.58	-1.36	-1.36	-2.68	260.75 SAR	1.40	35.00
STC	45.35	0.89	0.78	4.25	4.25	23.91	226.53 SAR	3.03	18.33
AL-RAJHI BANK	71.20	0.00	-0.84	-2.47	-2.47	-5.32	284.53 SAR	2.87	16.59
NCB	39.00	2.77	3.45	5.98	5.98	3.48	233.78 SAR	1.36	12.25
United Arab Emirates									
ETISALAT.AD	22.44	0.81	2.65	0.18	0.18	-1.84	206.60 AED	5.10	21.10
FAB.AD	13.74	-0.72	0.15	0.73	0.73	-19.65	151.78 AED	1.35	12.94
EMIRATES NBD	16.40	0.61	1.23	10.44	10.44	26.15	103.58 AED	1.08	6.19
DB ISLAMIC BK	5.70	0.53	0.88	4.20	4.20	0.00	41.27 AED	1.02	7.93
EMAAR PROPERT	6.83	-0.29	-0.73	6.55	6.55	16.55	60.36 AED	0.85	7.20
Qatar									
QNB	15.69	0.51	0.32	1.75	1.75	-12.83	144.76 QAR	1.41	10.51
INDUSTRIES QAT	11.90	0.00	-0.17	5.97	5.97	-7.10	71.92 QAR	1.97	9.89
QA ISLAMIC BK	18.25	2.41	2.47	3.05	3.05	-1.67	43.08 QAR	1.62	10.86
MASRAF AL RAYA	2.50	-0.52	-0.48	-2.58	-2.58	-21.26	23.20 QAR	0.99	22.35
MESAIEED PETRO	1.92	0.58	0.42	1.26	1.26	-9.54	24.15 QAR	1.48	15.17
OMAN									
BANK MUSCAT	0.280	0.00	0.36	1.45	1.45	1.82	2.11 OMR	0.97	8.33
OMANTEL	0.986	11.04	-0.70	-0.60	-0.60	7.17	0.74 OMR	1.21	7.69
BANK DHOFAR	0.175	0.00	0.00	1.16	1.16	0.00	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.290	0.00	0.00	3.57	3.57	0.35	0.47 QAR	0.73	12.71
OMINVEST	0.380	0.00	0.00	0.53	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
05-July 23	24.3%	15.55%	0.066%	1.72%	0.24%	5.22%	17.6%	13.9%	6.23%	4.48%
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.27 %The leading sector bottom performance indices today are Energy -1.21 % Basic materials -1.17 % Consumer Disc -1.17 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.47 %, SABIC have negative performance today by -1.36 %. STC has a positive performance today by + 0.89 %, Al Rajhi Bank flat performance today 0 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.81 %, FAB.AD have negative performance today by -0.72 %



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