



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 17th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,104.15	-0.45	-0.45	-3.37	-3.10	5.97	2.03	18.11	3.45	11,209.79
Qatar (QE Index)	10,253.49	-0.64	-0.64	0.58	1.78	-4.00	1.23	12.33	4.80	521.33
Dubai (DFMGI)	4,043.40	0.23	-0.59	-0.97	6.63	21.20	1.47	9.89	4.41	579.67
Abu Dhabi (ADI)	9,880.46	0.86	1.96	0.72	3.46	-3.24	2.55	15.87	2.21	2,774.04
Bahrain (BAX)	1,924.82	-0.35	-0.35	-1.40	-1.69	1.56	0.76	9.33	6.04	7.00
Muscat SE INDEX	4,711.25	-0.31	-0.31	-1.83	-1.19	-3.01	0.85	10.24	4.66	6.60
SP GCC Comp LMC	175.33	-0.47	-0.47	-2.03	-2.06	-1.93	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.29	0.00	0.00	1.14	4.42	2.03				
Developed Markets										
MSCI World Index	2,960.98	-0.73	0.41	-0.84	-0.19	13.77				
U.S. (S&P 500)	4,450.32	-1.22	-0.16	-1.27	0.00	15.91	3.95	22.63	2.04	39,244.49
U.K. (FTSE 100)	7,711.38	0.50	3.12	3.66	2.39	3.48	1.62	10.88	3.80	2,082.31
Japan (topix)	2,428.38	0.95	2.94	4.13	6.11	28.37	1.41	14.45	2.11	876,893.93
Emerging Markets										
MSCI EM Index	984.99	0.29	1.14	0.48	-0.45	2.99				
China (SSE Composite)	3,117.74	-0.28	0.03	-0.07	-2.63	0.92	1.36	12.00		44,025.04
India (Sensex)	67,838.63	0.47	1.86	4.64	4.82	11.50	4.39	23.39	1.19	131,964.90

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,011.06	-0.26	-0.26	0.07	-0.27	-3.85	1.48	15.74	3.23	45.60
Kuwait Premier Index	7,676.29	-0.37	-0.37	-0.25	-1.70	-5.41	1.64	17.38	3.07	36.50
Kuwait Main Index	5,765.56	0.18	0.18	1.28	5.53	3.02	1.05	11.12	3.90	9.10
Kuwait Sector										
Banking	1,704.41	-0.24	-0.24	0.36	-0.08	-4.99	1.73	17.86	2.70	28.95
Telecom	1,112.59	0.25	0.25	0.73	-0.43	-5.83	1.68	10.33	6.36	3.41
Industrials	940.74	0.14	0.14	0.01	-6.21	-12.80	1.05	16.39	2.98	3.30
Financial Services	1,267.39	-0.87	-0.87	-0.20	3.29	0.81	1.02	14.85	3.88	4.06
Real Estate	1,212.11	-0.71	-0.71	-0.23	0.38	0.28	0.95	15.03	2.06	2.62
Basic Materials	850.35	-1.14	-1.14	-3.42	-6.29	-1.71	1.50	9.60	9.09	0.49
Health Care	482.72	0.00	0.00	0.00	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	614.15	-0.88	-0.88	0.90	-0.15	27.96	1.42	78.61	1.99	0.19
Insurance	2,219.47	0.42	0.42	-1.44	5.19	43.12	1.25	7.42	4.22	0.89
Consumer Discretionary	1,540.09	-0.12	-0.12	-3.75	-1.28	3.58				
Energy	970.85	-1.41	-1.41	-2.48	-4.76	-14.73	0.78	9.99	5.16	0.21
Technology	560.17	0.00	0.00	-3.75	-17.12	-19.54	0.69			0.01
Utilities	515.79	0.51	0.51	1.03	-2.00	4.25				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

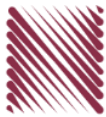
Oil prices inched higher on Sunday, buoyed by forecasts of a widening supply deficit in the fourth quarter after Saudi Arabia and Russia extended cuts and on optimism of a demand recovery in China, the world's top crude importer, Brent crude futures rose 5 cents, or 0.1%, to \$93.93 a barrel

Kuwait Market

The market closed down by - 0.26% at 7,011.06 value traded 32.1 million KD, Premier market value reached 21.5 million KD down by - 0.37% at 7,676.29

KSA Market

The market closed down today by - 0.45% at 11,104.15



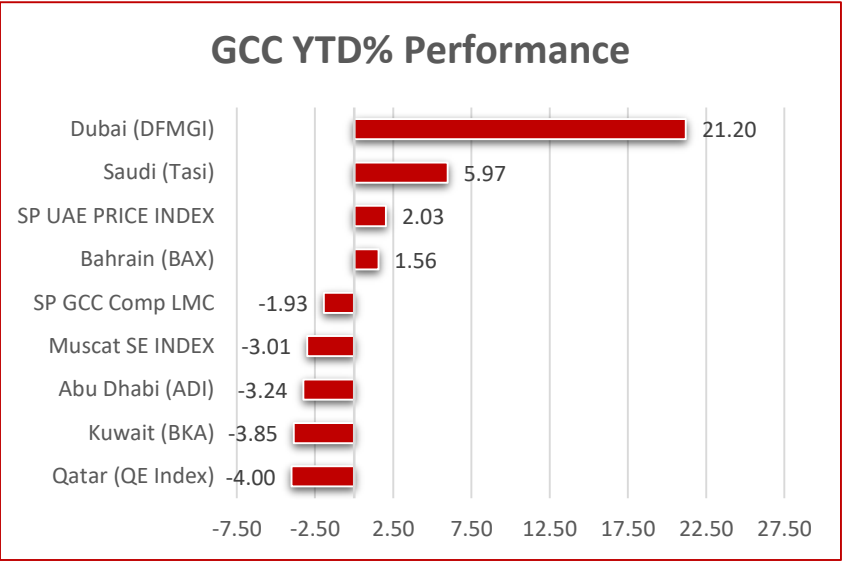
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.918	-0.76	-0.76	-0.22	-1.82	-10.58	13.87	1.77	3.68	7.28
KFH	0.746	-0.13	-0.13	0.13	0.13	-0.29	19.43	1.91	2.25	11.01
ZAIN	0.505	0.00	0.00	-0.98	-2.51	-10.30	10.40	1.77	6.93	2.18
BOUBYAN BANK	0.618	-0.64	-0.64	1.31	-3.44	-17.91	40.90	2.54	0.92	2.45
AGILITY	0.571	0.53	0.53	-0.70	-8.35	-20.69	21.20	0.77	0.00	1.53
Saudi Arabia										
ARAMCO	34.10	0.44	0.44	-2.29	5.74	16.85	16.25	5.40	3.96	8,252.20
SABIC	85.50	0.00	0.00	-3.28	-3.06	-4.36	64.71	1.45	4.44	256.50
STC	38.40	0.00	0.00	-3.52	-11.72	4.92	15.46	2.54	4.17	192.00
AL-RAJHI BANK	70.60	-1.12	-1.12	-2.22	-3.29	-6.12	16.56	2.74	2.51	282.40
NCB	34.00	-0.15	-0.15	-4.90	-7.61	-9.79	10.74	1.19	3.82	204.00
Abu Dhabi										
ETISALAT.AD	20.30	0.89	4.86	2.32	-9.37	-11.20	17.92	4.23	3.94	176.55
FAB.AD	13.78	0.73	3.14	0.73	1.03	-19.42	11.68	1.31	3.77	152.24
EMIRATES NBD	17.35	2.66	3.58	6.12	16.84	33.46	5.63	1.11	3.46	109.59
DB ISLAMIC DB	5.68	-0.35	1.07	0.71	3.84	-0.35	7.56	0.98	5.28	41.13
EMAR.DU	7.05	0.14	0.71	-0.14	9.98	20.31	7.89	0.88	3.55	62.31
Qatar										
QNB	15.160	-1.24	-1.24	-2.82	-1.69	-15.78	10.16	1.36	3.96	140.67
INDUSTREIS QAT	13.750	0.29	0.29	11.25	22.44	7.34	15.93	2.22	8.00	83.57
QA ISLAMIC BK	18.840	0.21	0.21	-2.48	6.38	1.51	11.25	1.62	3.32	44.72
MASRAF AL RAYA	2.249	1.08	1.08	1.31	-12.25	-29.08	20.17	0.87	4.45	21.01
MESAIEED PETRO	1.705	-6.73	-6.73	-7.34	-10.26	-19.84	16.30	1.29	6.45	21.52
Oman										
BANK MUSCAT	0.285	0.00	0.00	0.00	3.26	3.64	11.22	0.96	5.26	2.14
OMANTEL	1.010	0.10	0.10	-1.94	1.81	9.78	32.66	1.21	3.22	0.76
BANK DHOFAR	0.170	0.00	0.00	-2.86	-1.73	-2.86	19.52	0.71	2.94	0.51
NAT BANK OF OMAN	0.300	0.00	0.00	1.35	7.14	3.81	10.97	0.75	2.47	0.49
OMINVEST	0.395	-1.25	-1.25	-0.75	4.50	-5.95	5.80	0.88	3.80	0.26

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
6-September-23	24.37%	14.52%	0.07%	2.21%	0.24%	5.10%	17.55%	13.48%	6.06%	4.86%
13-September-23	24.30%	14.41%	0.07%	2.11%	0.24%	5.11%	17.54%	13.46%	6.06%	4.86%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.26 %The leading sector bottom performance indices today are Energy -1.41 % Basic materials -1.14 % Consumer staples -0.88 % respectively

KSA

Saudi Armco has a positive performance today by + 0.44 %, SABIC has a flat performance today, STC has a flat performance today, Al Rajhi Bank has a negative performance today by -1.12 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.89 %, FAB.AD has a positive performance today by + 0.73 %,



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