



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, July 18th 2023





Market Watch

Tuesday, July 18, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,755.94	-0.10	0.52	2.70	2.70	12.31	11,034 SAR	2.06	18.55
Qatar (QE Index)	10,446.11	0.25	0.87	2.30	2.30	-3.51	553 QAR	1.42	11.48
Dubai (DFMGI)	3,986.36	0.07	0.43	6.06	6.06	20.56	577 AED	1.54	18.60
Abu Dhabi (ADI)	9,629.31	0.17	0.73	1.54	1.54	-5.03	1,435 AED	1.83	21.27
Bahrain (BAX)	1,976.88	0.28	0.57	1.43	1.43	4.78	9 BHD	7.29	18.00
MUSCAT SE INDEX	4,805.07	1.10	0.28	0.87	0.87	-0.98	5 OMR	1.01	13.25
SP GCC Comp LMC	184.01	0.27	0.70	2.96	2.96	3.10			
SP UAE PRICE INDEX	138.06	0.25	1.02	3.78	3.78	1.40			
Developed Markets									
MSCI World Index	3,028.71	0.68	0.76	2.56	2.56	16.90			
U.S. (S&P 500)	4,536.34	0.71	1.00	2.35	2.35	18.63			
U.K. (FTSE 100)	7,663.73	0.64	0.18	-1.03	-1.03	0.03			
Japan (Topix)	2,262.20	0.59	0.41	-1.59	-1.59	19.06			
Emerging Markets									
MSCI EM Index	1,014.58	-0.55	0.16	3.30	3.30	6.87			
China (SSE Composite)	3,167.75	-0.37	-1.19	-0.13	-0.13	3.51			
India (Sensex)	66,684.26	0.31	1.89	3.21	3.21	9.79			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,319.97	0.45	0.09	4.13	4.13	0.38	47.12 KWD	1.78	18.53
Kuwait Premier Index	8,161.09	0.52	0.24	4.50	4.50	0.56	36.89 KWD	1.72	18.39
Kuwait Main Index	5,606.03	0.17	-0.55	2.61	2.61	0.17	10.23 KWD	1.98	19.03
NIC 50	9,294.93	1.96	0.23	4.49	4.49	2.32	28.60 KWD	1.70	17.39
Kuwait Sector									
Banking	1,779.94	0.49	-0.24	4.35	4.35	-0.78	29.81 KWD	1.26	19.39
Telecom	1,149.46	0.26	0.10	2.87	2.87	-2.71	3.53 KWD	1.41	9.15
Industrials	1,035.94	0.04	0.12	3.28	3.28	-3.98	3.65 KWD	0.81	20.62
Financial services	1,310.44	1.01	2.12	6.80	6.80	4.23	3.78 KWD	0.78	19.44
Real estate	1,238.22	0.06	0.57	2.54	2.54	2.44	2.68 KWD	0.63	22.41
Basic materials	903.57	0.12	0.13	-0.42	-0.42	4.45	0.79 KWD	1.42	8.84
Health care	461.54	1.33	2.48	2.69	2.69	-0.07	0.23 KWD	0.99	6.96
Consumer services	615.02	0.16	0.20	-0.01	-0.01	28.14	0.84 KWD	0.88	14.23
Insurance	2,105.80	0.09	0.37	-0.20	-0.20	35.79	0.86 KWD	0.78	10.19
Consumer Disc	1,689.91	0.37	-1.60	8.32	8.32	13.66	0.19 KWD	1.11	0.00
Energy	1,021.33	2.82	2.04	0.19	0.19	-10.29	0.21 KWD	0.75	4.57
Technology	614.01	0.00	2.80	-9.15	-9.15	-11.81	0.01 KWD	0.76	0.00
Utilities	526.32	-0.50	-0.99	0.00	0.00	6.38	0.22 KWD	2.01	16.38

S&P GCC Composite LargeMidCap Index



— LAST — 200DMA

What Move the GCC markets

Oil Prices

Oil prices rose more than a dollar per barrel on Friday, buoyed by growing evidence of supply shortages in the coming months and rising tensions between Russia and Ukraine that could further hit supplies. Brent crude futures rose \$1.43, or 1.8%, to settle at \$81.07 a barrel.

Kuwait Market

The market closed up by 0.45% at 7,319.97 value traded 47.9 million KD, Premier market value traded reached 38.7 million KD up 0.52% at 8,161.09

KSA Market

The market closed down today by -0.10% at 11,755.94

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



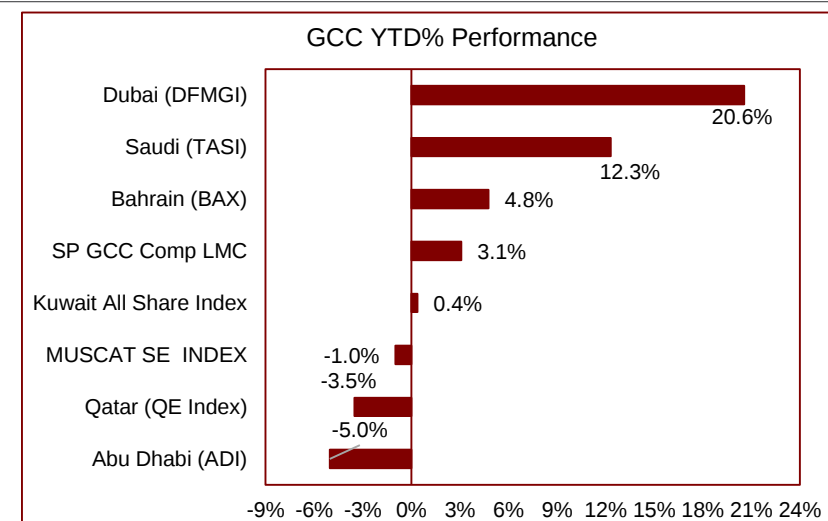
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.982	0.41	0.31	5.03	5.03	-4.35	7.78 KWD	1.89	27.00
KFH	0.783	1.03	0.26	5.10	5.10	4.65	11.56 KWD	1.99	32.00
Zain	0.532	0.38	-0.19	2.70	2.70	-5.51	2.30 KWD	1.79	11.34
BOUBYAN BANK	0.651	0.15	-0.61	1.72	1.72	-13.53	2.58 KWD	2.91	34.00
Agility	0.656	-0.15	-0.30	5.30	5.30	-8.89	1.76 KWD	0.92	23.65
Saudi Arabia									
ARAMCO	32.30	0.00	0.47	0.16	0.16	10.69	7,827.24 SAR	5.24	13.90
SABIC	86.10	-1.03	-2.60	-2.38	-2.38	-3.69	252.94 SAR	1.35	35.00
STC	45.60	0.55	1.33	4.83	4.83	24.59	227.56 SAR	3.03	18.47
AL-RAJHI BANK	70.70	-0.70	-1.53	-3.15	-3.15	-5.98	283.59 SAR	2.85	16.50
NCB	40.30	3.33	6.90	9.51	9.51	6.93	243.33 SAR	1.41	13.10
United Arab Emirates									
ETISALAT.AD	22.52	0.36	3.02	0.54	0.54	-1.49	206.60 AED	5.10	21.10
FAB.AD	13.74	0.00	0.15	0.73	0.73	-19.65	149.36 AED	1.28	12.92
EMIRATES NBD	16.40	0.00	1.23	10.44	10.44	26.15	103.27 AED	1.08	6.18
DB ISLAMIC BK	5.66	-0.70	0.18	3.47	3.47	-0.70	40.91 AED	1.01	7.84
EMAAR PROPERT	6.77	-0.88	-1.60	5.62	5.62	15.53	58.86 AED	0.82	7.02
Qatar									
QNB	15.69	0.00	0.32	1.75	1.75	-12.83	147.78 QAR	1.44	10.72
INDUSTRIES QAT	11.95	0.42	0.25	6.41	6.41	-6.71	73.51 QAR	2.01	10.10
QA ISLAMIC BK	18.40	0.82	3.31	3.90	3.90	-0.86	45.32 QAR	1.65	11.45
MASRAF AL RAYA	2.47	-1.00	-1.47	-3.55	-3.55	-22.04	23.09 QAR	0.96	22.27
MESAIEED PETRO	1.92	-0.10	0.31	1.16	1.16	-9.64	24.12 QAR	1.48	15.14
OMAN									
BANK MUSCAT	0.282	0.71	1.08	2.17	2.17	2.55	2.10 OMR	0.97	8.33
OMANTEL	1.000	12.61	0.70	0.81	0.81	8.70	0.75 OMR	1.23	7.69
BANK DHOFAR	0.175	0.00	0.00	1.16	1.16	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.300	3.45	3.45	7.14	7.14	3.81	0.49 QAR	0.75	12.71
OMINVEST	0.379	-0.26	-0.26	0.26	0.26	-9.76	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 up today by + 0.45 %The leading sector best performance indices today are Energy 2.82 % Health care 1.33 % Financial services 1.01 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 1.03%. STC has a positive performance today by + 0.55 %, Al Rajhi Bank have negative performance today by -0.7 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.36 %, FAB.AD flat performance today 0 %.



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