



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, September 18th 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)	11,036.04	-0.61	-1.06	-3.96	-3.69	5.32	2.01	17.97	3.48	11,209.89
Qatar (QE Index)	10,272.00	0.18	-0.46	0.76	1.96	-3.83	1.23	12.35	4.79	522.27
Dubai (DFMGI)	4,048.42	0.12	0.12	-0.84	6.76	21.35	1.47	9.90	4.41	578.06
Abu Dhabi (ADI)	9,817.04	-0.64	-0.64	0.07	2.79	-3.86	2.54	15.78	2.22	2,763.36
Bahrain (BAX)	1,922.12	-0.14	-0.48	-1.54	-1.83	1.42	0.76	9.29	6.07	6.99
Muscat SE INDEX	4,710.52	-0.02	-0.33	-1.84	-1.21	-3.02	0.85	10.23	4.67	6.59
SP GCC Comp LMC	174.41	-0.52	-0.99	-2.54	-2.57	-2.44	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.13	-0.11	-0.11	1.03	4.31	1.92				
Developed Markets										
MSCI World Index	2,956.14	-0.16	-0.16	-1.00	-0.36	13.58				
U.S. (S&P 500)	4,453.53	0.07	0.07	-1.20	0.07	15.99	3.96	22.73	2.04	39,467.49
U.K. (FTSE 100)	7,652.94	-0.76	-0.76	2.87	1.61	2.70	1.61	10.80	3.83	2,065.95
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	976.17	-0.90	-0.90	-0.42	-1.34	2.07				
China (SSE Composite)	3,125.93	0.26	0.26	0.19	-2.38	1.19	1.36	12.00		44,025.04
India (Sensex)	67,596.84	-0.36	-0.36	4.27	4.45	11.10	4.37	23.23	1.19	131,729.71
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,004.63	-0.09	-0.35	-0.02	-0.36	-3.94	1.48	15.70	3.24	45.49
Kuwait Premier Index	7,668.49	-0.10	-0.48	-0.35	-1.80	-5.51	1.64	17.32	3.08	36.38
Kuwait Main Index	5,762.39	-0.05	0.13	1.23	5.47	2.96	1.05	11.13	3.89	9.12
Kuwait Sector										
Banking	1,702.75	-0.10	-0.34	0.26	-0.18	-5.08	1.72	17.82	2.70	28.88
Telecom	1,106.58	-0.54	-0.29	0.18	-0.97	-6.34	1.68	10.36	6.35	3.41
Industrials	944.14	0.36	0.51	0.37	-5.87	-12.49	1.05	16.43	2.98	3.31
Financial Services	1,264.28	-0.25	-1.11	-0.44	3.04	0.56	1.01	14.68	3.91	4.03
Real Estate	1,212.43	0.03	-0.68	-0.21	0.41	0.31	0.94	14.90	2.08	2.60
Basic Materials	842.37	-0.94	-2.07	-4.33	-7.17	-2.63	1.48	9.49	9.19	0.48
Health Care	487.21	0.93	0.93	0.93	8.40	5.49	1.75	12.41	1.72	0.24
Consumer Staples	616.18	0.33	-0.55	1.24	0.18	28.38	1.41	77.43	2.01	0.19
Insurance	2,221.38	0.09	0.51	-1.36	5.28	43.24	1.25	7.46	4.21	0.89
Consumer Discretionary	1,544.49	0.29	0.16	-3.47	-1.00	3.88				
Energy	977.57	0.69	-0.72	-1.81	-4.10	-14.14	0.77	9.85	5.23	0.20
Technology	560.17	0.00	0.00	-3.75	-17.12	-19.54	0.69			0.01
Utilities	513.16	-0.51	0.00	0.52	-2.50	3.72				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices inched higher on Monday, 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 43 cents, or 0.41%, to \$93.98 a barrel.

Kuwait Market

The market closed down by – 0.09% at 7,004.63 value traded 31.3 million KD, Premier market value reached 21.1 million KD down by - 0.10% at 7,668.49

KSA Market

The market closed down today by - 0.61% at 11,036.04



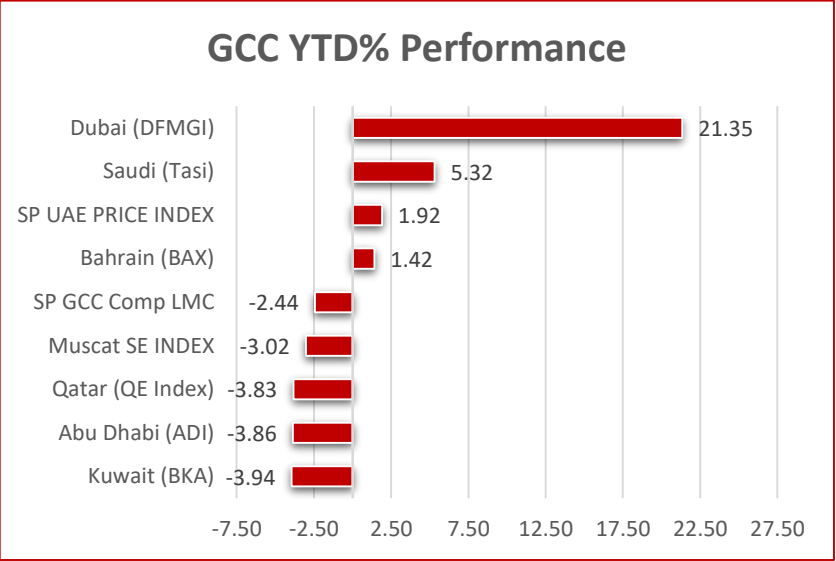
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.917	-0.11	-0.86	-0.33	-1.93	-10.68	13.86	1.76	3.69	7.27
KFH	0.745	-0.13	-0.27	0.00	0.00	-0.43	19.40	1.90	2.26	11.00
ZAIN	0.504	-0.20	-0.20	-1.18	-2.70	-10.48	10.38	1.76	6.94	2.18
BOUBYAN BANK	0.614	-0.65	-1.29	0.66	-4.06	-18.44	40.64	2.52	0.92	2.43
AGILITY	0.570	-0.18	0.35	-0.87	-8.51	-20.83	21.16	0.77	0.00	1.53
Saudi Arabia										
ARAMCO	34.20	0.29	0.74	-2.01	6.05	17.20	16.29	5.41	3.95	8,276.62
SABIC	84.10	-1.64	-1.64	-4.86	-4.65	-5.93	63.65	1.43	4.52	252.31
STC	37.95	-1.17	-1.17	-4.65	-12.76	3.69	15.28	2.51	4.22	189.76
AL-RAJHI BANK	69.60	-1.42	-2.52	-3.60	-4.66	-7.45	16.32	2.70	2.55	278.41
NCB	33.60	-1.18	-1.32	-6.01	-8.70	-10.85	10.61	1.17	3.86	201.61
Abu Dhabi										
ETISALAT.AD	20.36	0.30	0.30	2.62	-9.11	-10.94	17.97	4.24	3.93	177.06
FAB.AD	13.72	-0.44	-0.44	0.29	0.59	-19.77	11.63	1.30	3.79	151.57
EMIRATES NBD	17.30	-0.29	-0.29	5.81	16.50	33.08	5.62	1.11	3.47	109.27
DB ISLAMIC DB	5.65	-0.53	-0.53	0.18	3.29	-0.88	7.52	0.98	5.31	40.91
EMAR.DU	7.05	0.00	0.00	-0.14	9.98	20.31	7.89	0.88	3.55	62.31
Qatar										
QNB	15.100	-0.40	-1.63	-3.21	-2.08	-16.11	10.12	1.35	3.97	138.78
INDUSTREIS QAT	13.760	0.07	0.36	11.33	22.53	7.42	15.94	2.22	7.99	82.83
QA ISLAMIC BK	18.780	-0.32	-0.11	-2.80	6.04	1.19	11.21	1.61	3.33	44.16
MASRAF AL RAYA	2.249	0.00	1.08	1.31	-12.25	-29.08	20.17	0.87	4.45	20.81
MESAIEED PETRO	1.787	4.81	-2.24	-2.88	-5.95	-15.98	17.09	1.35	6.16	22.34
Oman										
BANK MUSCAT	0.284	-0.35	-0.35	-0.35	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.009	-0.10	0.00	-2.04	1.71	9.67	32.63	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	0.304	1.33	1.33	2.70	8.57	5.19	11.12	0.76	2.43	0.49
OMINVEST	0.394	-0.25	-1.50	-1.01	4.23	-6.19	5.79	0.88	3.81	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 -0.09 %The leading sector bottom performance indices today are Basic materials -0.94 %, Telecom -0.54 % Utilities -0.51 % respectively

KSA

Saudi Armco has a positive performance today by + 0.29 %, SABIC has a negative performance today by – 1.64 %, STC has a negative performance today by – 1.17 %, Al Rajhi Bank has a negative performance today by -1.42 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.30 %, FAB.AD has a negative performance today by - 0.44 %,



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