

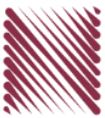


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, September 19th 2023





Tuesday, September 19, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,070.77	0.31	-0.75	-3.66	-3.39	5.65	2.02	18.00	3.47	11,249.53
Qatar (QE Index)	10,318.66	0.45	-0.01	1.22	2.42	-3.39	1.24	12.41	4.77	525.11
Dubai (DFMGI)	4,074.72	0.65	0.77	-0.20	7.46	22.14	1.48	9.98	4.36	585.01
Abu Dhabi (ADI)	9,822.31	0.05	-0.59	0.12	2.85	-3.81	2.53	15.76	2.22	2,765.47
Bahrain (BAX)	1,929.44	0.38	-0.11	-1.16	-1.45	1.80	0.76	9.34	6.03	7.02
Muscat SE INDEX	4,687.58	-0.49	-0.81	-2.32	-1.69	-3.50	0.84	10.20	4.68	6.57
SP GCC Comp LMC	174.81	0.23	-0.76	-2.32	-2.35	-2.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.17	0.03	-0.08	1.05	4.34	1.94				
Developed Markets										
MSCI World Index	2,951.17	-0.17	-0.33	-1.17	-0.52	13.39				
U.S. (S&P 500)	4,443.95	-0.22	-0.14	-1.41	-0.14	15.74	3.97	22.76	2.04	39,489.20
U.K. (FTSE 100)	7,660.20	0.09	-0.66	2.97	1.71	2.80	1.61	10.81	3.82	2,067.38
Japan (topix)	2,430.30	0.08	0.08	4.22	6.19	28.47	1.42	14.46	2.11	877,466.56
Emerging Markets										
MSCI EM Index	974.50	-0.17	-1.07	-0.59	-1.51	1.89				
China (SSE Composite)	3,124.96	-0.03	0.23	0.16	-2.41	1.16	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	131,737.26

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,989.67	-0.21	-0.56	-0.23	-0.57	-4.15	1.48	15.68	3.24	45.46
Kuwait Premier Index	7,646.17	-0.29	-0.77	-0.64	-2.09	-5.79	1.64	17.30	3.08	36.34
Kuwait Main Index	5,766.70	0.07	0.20	1.30	5.55	3.04	1.05	11.11	3.89	9.11
Kuwait Sector										
Banking	1,697.81	-0.29	-0.63	-0.03	-0.47	-5.36	1.72	17.81	2.70	28.86
Telecom	1,104.95	-0.15	-0.44	0.04	-1.12	-6.48	1.67	10.30	6.38	3.40
Industrials	938.70	-0.58	-0.07	-0.21	-6.42	-12.99	1.06	16.48	2.97	3.32
Financial Services	1,265.25	0.08	-1.03	-0.36	3.12	0.64	1.01	14.61	3.92	4.02
Real Estate	1,210.75	-0.14	-0.82	-0.35	0.27	0.17	0.94	14.88	2.08	2.60
Basic Materials	842.60	0.03	-2.04	-4.30	-7.14	-2.60	1.47	9.40	9.28	0.48
Health Care	486.61	-0.12	0.81	0.81	8.27	5.36	1.77	12.53	1.71	0.24
Consumer Staples	612.43	-0.61	-1.16	0.62	-0.43	27.60	1.41	78.02	2.00	0.19
Insurance	2,229.23	0.35	0.86	-1.01	5.65	43.75	1.26	7.46	4.20	0.90
Consumer Discretionary	1,559.68	0.98	1.15	-2.52	-0.02	4.90				
Energy	977.18	-0.04	-0.76	-1.85	-4.14	-14.17	0.77	9.92	5.19	0.20
Technology	560.17	0.00	0.00	-3.75	-17.12	-19.54	0.69			0.01
Utilities	505.26	-1.54	-1.54	-1.03	-4.00	2.13				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose in early trade on Tuesday for the fourth consecutive session, as weak shale output in the U.S. spurred further concerns about a supply deficit stemming from extended production cuts by Saudi Arabia and Russia, while global oil benchmark Brent crude future rose 34 cents, or 0.36%, to \$94.77 a barrel.

Kuwait Market

The market closed down by – 0.21% at 6,989.67 value traded 43.7 million KD, Premier market value reached 30.6 million KD down by – 0.29% at 7,646.17

KSA Market

The market closed up today by + 0.31% at 11,070.77

DAILY MARKETS WRAP,
NIC RESEARCH AND STUDIES DEP



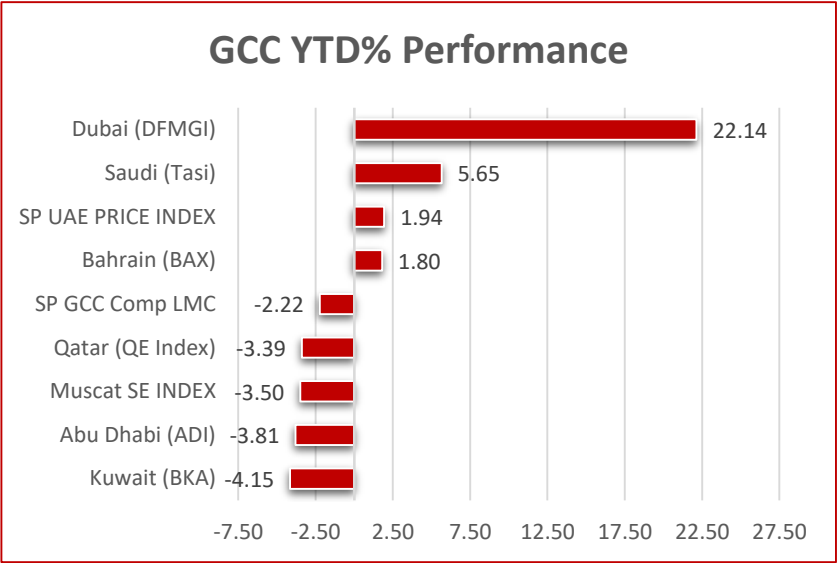
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.917	0.00	-0.86	-0.33	-1.93	-10.68	13.86	1.76	3.69	7.27
KFH	0.742	-0.40	-0.67	-0.40	-0.40	-0.83	19.32	1.90	2.27	10.95
ZAIN	0.504	0.00	-0.20	-1.18	-2.70	-10.48	10.38	1.76	6.94	2.18
BOUBYAN BANK	0.610	-0.65	-1.93	0.00	-4.69	-18.97	40.37	2.50	0.93	2.42
AGILITY	0.564	-1.05	-0.70	-1.91	-9.47	-21.67	20.94	0.76	0.00	1.51
Saudi Arabia										
ARAMCO	34.30	0.29	1.03	-1.72	6.36	17.54	16.34	5.43	3.94	8,300.60
SABIC	84.50	0.48	-1.17	-4.41	-4.20	-5.48	63.95	1.43	4.50	253.50
STC	38.45	1.32	0.13	-3.39	-11.61	5.05	15.49	2.54	4.16	192.25
AL-RAJHI BANK	69.00	-0.86	-3.36	-4.43	-5.48	-8.24	16.18	2.67	2.57	276.00
NCB	33.60	0.00	-1.32	-6.01	-8.70	-10.85	10.61	1.17	3.86	201.60
Abu Dhabi										
ETISALAT.AD	20.48	0.59	0.89	3.23	-8.57	-10.41	18.08	4.27	3.91	178.11
FAB.AD	13.50	-1.60	-2.03	-1.32	-1.03	-21.05	11.44	1.28	3.85	149.14
EMIRATES NBD	17.80	2.89	2.59	8.87	19.87	36.92	5.78	1.14	3.37	112.43
DB ISLAMIC DB	5.67	0.35	-0.18	0.53	3.66	-0.53	7.55	0.98	5.29	41.05
EMAR.DU	7.12	0.99	0.99	0.85	11.08	21.50	7.97	0.89	3.51	62.93
Qatar										
QNB	15.170	0.46	-1.17	-2.76	-1.62	-15.72	10.16	1.36	3.96	140.25
INDUSTREIS QAT	13.950	1.38	1.75	12.86	24.22	8.90	16.16	2.25	7.89	84.48
QA ISLAMIC BK	18.820	0.21	0.11	-2.59	6.27	1.40	11.24	1.61	3.32	44.51
MASRAF AL RAYA	2.252	0.13	1.21	1.44	-12.13	-28.98	20.19	0.87	4.44	20.96
MESAIEED PETRO	1.799	0.67	-1.59	-2.23	-5.32	-15.42	17.20	1.36	6.11	22.62
Oman										
BANK MUSCAT	0.285	0.35	0.00	0.00	3.26	3.64	11.22	0.96	5.26	2.14
OMANTEL	1.005	-0.40	-0.40	-2.43	1.31	9.24	32.50	1.20	3.23	0.75
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	0.305	0.33	1.67	3.04	8.93	5.54	11.16	0.76	2.43	0.50
OMINVEST	0.394	0.00	-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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.21 %The leading sector bottom performance indices today are Utilities -1.54 %, Consumer Staples -0.61 % Industrials -0.58 % respectively

KSA

Saudi Armco has a positive performance today by + 0.29 %, SABIC has a positive performance today by + 0.48 %, STC has a positive performance today by + 1.32 %, Al Rajhi Bank has a negative performance today by -0.86 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.59 %, FAB.AD has a negative performance today by – 1.60 %,



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