



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

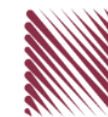
GCC DAILY MORNING BRIEF

Sunday, August 20th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

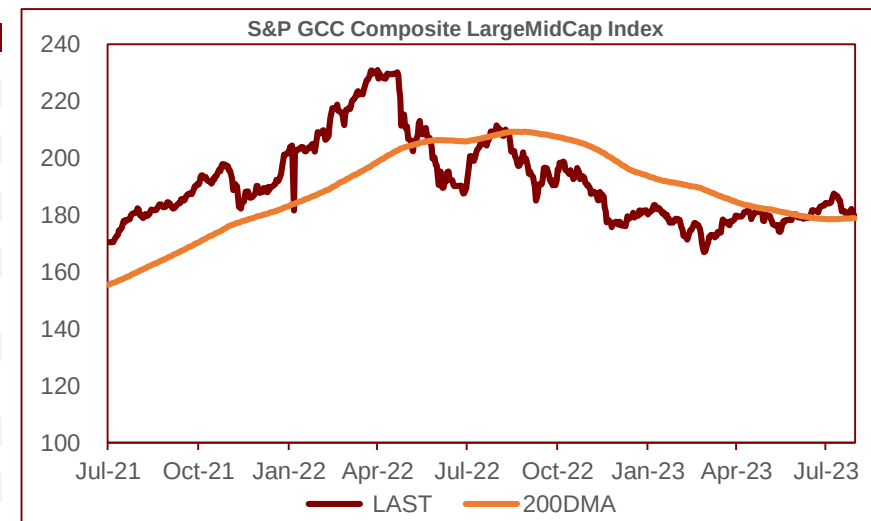


Market Watch

Sunday, August 20, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,501.42	0.44	0.68	-1.63	0.37	9.76	11,544 SAR	1.98	17.90
Qatar (QE Index)	10,576.82	0.05	-1.48	-3.52	4.99	-0.98	558 QAR	1.39	12.69
Dubai (DFMGI)	4,050.59	0.04	0.04	-0.21	6.82	21.42	579 AED	1.59	22.21
Abu Dhabi (ADI)	9,800.65	0.23	-1.05	0.14	2.62	-4.02	1,435 AED	1.82	19.00
Bahrain (BAX)	1,961.75	0.47	-0.53	-1.15	0.20	3.51	9 BHD	2.07	18.00
MUSCAT SE INDEX	4,772.77	-0.26	0.33	-0.07	0.10	-1.74	5 OMR	0.99	12.01
SP GCC Comp LMC	180.84	0.42	0.02	-2.48	1.02	1.15			
SP UAE PRICE INDEX	139.98	0.28	-0.85	-0.95	4.19	1.80			
Developed Markets									
MSCI World Index	2,897.50	-0.15	-2.93	-5.44	-2.33	11.33			
U.S. (S&P 500)	4,369.71	-0.01	-2.22	-4.78	-1.81	13.81			
U.K. (FTSE 100)	7,262.43	-0.65	-4.68	-5.68	-3.57	-2.54			
Japan (Topix)	2,237.29	-0.70	-2.87	-3.67	-2.24	18.27			
Emerging Markets									
MSCI EM Index	964.44	-0.97	-4.35	-7.88	-2.53	0.84			
China (SSE Composite)	3,131.95	-1.00	-3.77	-4.83	-2.19	1.38			
India (Sensex)	64,948.66	-0.31	-1.13	-2.37	0.36	6.75			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,099.97	-0.34	-0.67	-2.12	1.00	-2.64	45.84 KWD	1.66	21.35
Kuwait Premier Index	7,808.81	-0.19	-0.66	-3.13	-0.01	-3.78	35.40 KWD	1.64	20.50
Kuwait Main Index	5,740.40	-0.91	-0.72	1.96	5.07	2.57	10.43 KWD	1.74	24.26
NIC 50	9,294.93	1.96	-0.67	-3.14	-0.02	2.32	28.60 KWD	1.62	19.50
Kuwait Sector									
Banking	1,724.27	-0.51	-0.98	-2.53	1.08	-3.88	29.00 KWD	1.15	21.50
Telecom	1,111.57	0.52	1.03	-0.17	-0.52	-5.92	3.41 KWD	1.36	8.94
Industrials	964.49	-0.89	-2.35	-3.68	-3.85	-10.60	3.40 KWD	0.83	18.38
Financial services	1,271.08	-0.29	-0.35	-1.49	3.59	1.10	3.66 KWD	0.78	31.39
Real estate	1,238.72	0.49	0.42	-0.91	2.58	2.48	2.68 KWD	0.62	26.51
Basic materials	857.26	0.36	0.77	-2.93	-5.52	-0.91	0.76 KWD	2.00	9.69
Health care	471.23	-1.46	3.46	3.73	4.85	2.03	0.23 KWD	0.96	10.87
Consumer services	612.74	0.27	8.42	-1.43	-0.38	27.67	0.79 KWD	0.95	13.07
Insurance	2,226.75	0.01	1.35	2.19	5.53	43.59	0.91 KWD	0.88	10.23
Consumer Disc	1,671.99	0.13	-1.42	-2.84	7.17	12.45	0.19 KWD	1.13	38.87
Energy	987.14	-0.07	-2.18	-1.18	-3.16	-13.30	0.21 KWD	0.67	4.41
Technology	566.72	0.00	-4.88	-1.77	-16.15	-18.60	0.01 KWD	0.70	0.00
Utilities	507.89	-0.52	-0.52	-4.46	-3.50	2.66	0.21 KWD	1.94	15.81



What Move the GCC markets

Oil Prices

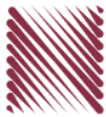
Oil prices rose about 1% on Friday on signs of slowing U.S. output, but both crude benchmarks also ended their longest weekly rally of 2023 on mounting concerns about global demand growth, Brent crude futures rose 68 cents, or 0.8%, to settle at \$84.80 a barrel.

Kuwait Market

The market closed down by - 0.34% at 7,099.97 value traded 22.6 million KD, Premier market value reached 14.6 million KD down - 0.19% at 7,808.81

KSA Market

The market closed up today by + 0.44% at 11,501.42



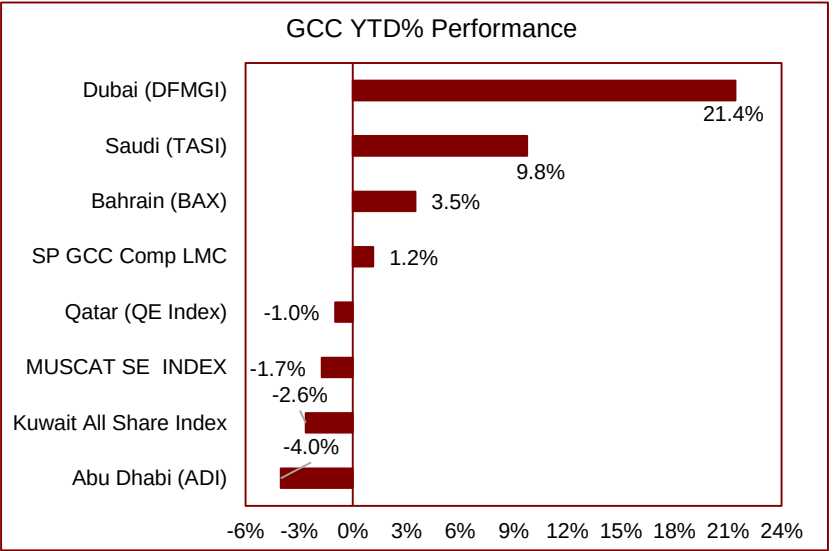
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.930	-0.43	0.00	-3.33	-0.53	-9.42	7.37 KWD	1.79	27.00
KFH	0.756	-0.13	-1.18	-4.18	1.48	1.04	11.16 KWD	1.93	32.00
Zain	0.516	0.39	0.19	-0.96	-0.39	-8.35	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.620	-0.32	-0.64	0.00	-3.13	-17.64	2.46 KWD	2.54	34.00
Agility	0.604	-1.63	-4.28	-4.13	-3.05	-16.11	1.62 KWD	0.81	22.42
Saudi Arabia									
ARAMCO	35.00	-0.14	2.94	8.02	8.53	19.94	8,472.26 SAR	5.54	17.06
SABIC	88.00	1.73	0.80	2.68	-0.23	-1.57	264.07 SAR	1.49	35.00
STC	40.75	0.25	-1.57	-3.89	-6.32	11.34	203.80 SAR	2.69	16.34
AL-RAJHI BANK	73.10	0.14	1.53	-2.01	0.14	-2.79	292.48 SAR	2.83	17.12
NCB	35.90	1.13	-0.28	-6.87	-2.45	-4.75	215.46 SAR	1.26	11.23
United Arab Emirates									
ETISALAT.AD	21.30	1.62	-3.62	-4.91	-4.91	-6.82	206.60 AED	5.10	21.10
FAB.AD	13.94	0.29	-2.52	-4.78	2.20	-18.48	153.99 AED	1.32	11.81
EMIRATES NBD	16.90	-0.29	3.68	-0.59	13.80	30.00	106.74 AED	1.08	5.49
DB ISLAMIC BK	5.65	0.71	-1.91	-1.74	3.29	-0.88	40.91 AED	0.98	7.52
EMAAR PROPERT	6.78	-0.15	-1.02	0.30	5.77	15.70	59.92 AED	0.84	7.59
Qatar									
QNB	16.18	-0.25	-2.29	-4.71	4.93	-10.11	149.45 QAR	1.45	10.84
INDUSTRIES QAT	13.01	0.08	-3.63	-2.40	15.85	1.56	78.71 QAR	2.10	14.39
QA ISLAMIC BK	20.22	0.60	-0.15	-4.40	14.17	8.94	47.78 QAR	1.73	12.07
MASRAF AL RAYA	2.40	-1.76	-3.85	-4.50	-6.48	-24.41	22.29 QAR	0.93	21.50
MESAIEED PETRO	1.90	-0.52	-1.45	-2.51	0.05	-10.63	23.88 QAR	1.44	18.17
OMAN									
BANK MUSCAT	0.281	0.00	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.030	15.99	3.00	3.52	3.83	11.96	0.77 OMR	1.23	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.295	-1.01	0.34	2.08	5.36	2.08	0.48 QAR	0.74	12.71
OMINVEST	0.385	0.26	1.32	-1.03	1.85	-8.33	0.26 QAR	0.86	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-August 23	24.42%	15.0%	0.07%	2.09%	0.24%	5.07%	17.57%	13.68%	6.14%	4.54%
16-August 23	24.40%	15.02%	0.07%	2.19%	0.24%	5.10%	17.55%	13.62%	6.15%	4.63%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.34 %The leading sector bottom performance indices today are Health care -1.46 % Industrials -0.89 % Utilities -0.52 % respectively

KSA

Saudi Armco has a negative performance today by -0.14 %, SABIC has a positive performance today by + 1.73 %, STC has a positive performance today by + 0.25 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.62 %, FAB.AD has a positive performance today by + 0.29 %



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