

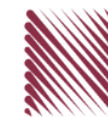


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, September 20th 2023





Wednesday, September 20, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/E	P/B	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,061.50	-0.08	-0.83	-3.74	-3.47	5.56	2.01	17.96	3.48	11,244.33
Qatar (QE Index)	10,294.65	-0.23	-0.24	0.98	2.18	-3.62	1.24	12.38	4.78	524.41
Dubai (DFMGI)	4,138.40	1.56	2.35	1.36	9.14	24.05	1.51	10.16	4.29	597.17
Abu Dhabi (ADI)	9,822.56	0.00	-0.59	0.13	2.85	-3.80	2.53	15.76	2.22	2,767.83
Bahrain (BAX)	1,922.89	-0.34	-0.44	-1.50	-1.79	1.46	0.76	9.30	6.05	6.99
Muscat SE INDEX	4,694.10	0.14	-0.67	-2.19	-1.55	-3.36	0.84	10.20	4.68	6.57
SP GCC Comp LMC	174.87	0.04	-0.73	-2.29	-2.32	-2.19	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.37	0.86	0.77	1.92	5.23	2.82				
Developed Markets										
MSCI World Index	2,936.36	-0.50	-0.83	-1.66	-1.02	12.82				
U.S. (S&P 500)	4,402.20	-0.94	-1.08	-2.34	-1.08	14.66	3.96	22.71	2.05	39,406.64
U.K. (FTSE 100)	7,731.65	0.93	0.26	3.93	2.66	3.76	1.62	10.92	3.79	2,087.40
Japan (topix)	2,406.00	-1.00	-0.92	3.17	5.13	27.19	1.40	14.32	2.13	868,716.64
Emerging Markets										
MSCI EM Index	970.87	-0.37	-1.43	-0.96	-1.88	1.52				
China (SSE Composite)	3,108.57	-0.52	-0.29	-0.36	-2.92	0.63	1.36	12.00		44,025.04
India (Sensex)	66,800.84	-1.18	-1.53	3.04	3.22	9.80	4.32	22.96	1.20	130,426.33

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,965.68	-0.34	-0.90	-0.57	-0.91	-4.48	1.47	15.65	3.24	45.37
Kuwait Premier Index	7,615.14	-0.41	-1.17	-1.04	-2.49	-6.17	1.63	17.26	3.09	36.25
Kuwait Main Index	5,760.23	-0.11	0.09	1.19	5.43	2.92	1.05	11.11	3.89	9.12
Kuwait Sector										
Banking	1,693.27	-0.27	-0.89	-0.29	-0.73	-5.61	1.72	17.76	2.71	28.79
Telecom	1,098.78	-0.56	-0.99	-0.52	-1.67	-7.00	1.67	10.29	6.39	3.39
Industrials	933.80	-0.52	-0.60	-0.73	-6.90	-13.45	1.05	16.39	2.99	3.30
Financial Services	1,260.73	-0.36	-1.39	-0.72	2.75	0.28	1.01	14.61	3.92	4.02
Real Estate	1,201.13	-0.79	-1.61	-1.14	-0.53	-0.63	0.94	14.84	2.08	2.60
Basic Materials	839.64	-0.35	-2.39	-4.64	-7.47	-2.94	1.47	9.40	9.28	0.48
Health Care	486.91	0.06	0.87	0.87	8.34	5.43	1.77	12.52	1.71	0.24
Consumer Staples	613.12	0.11	-1.04	0.73	-0.32	27.75	1.40	77.29	2.01	0.19
Insurance	2,234.89	0.25	1.12	-0.76	5.92	44.11	1.26	7.49	4.19	0.90
Consumer Discretionary	1,552.21	-0.48	0.67	-2.99	-0.50	4.40				
Energy	976.59	-0.06	-0.82	-1.90	-4.20	-14.22	0.77	9.93	5.19	0.20
Technology	560.17	0.00	0.00	-3.75	-17.12	-19.54	0.69			0.01
Utilities	502.63	-0.52	-2.05	-1.55	-4.50	1.59				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

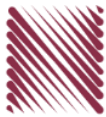
Oil prices fell nearly 1% on Wednesday ahead of the U.S. Federal Reserve's interest rate decision, with investors uncertain when peak rates will be hit and how much of an impact it will have on energy demand, Global benchmark Brent crude futures fell by \$76 cents, or 0.8%, to \$93.58 a barrel.

Kuwait Market

The market closed down by – 0.34% at 6,965.68 value traded 38.0 million KD, Premier market value reached 25.6 million KD down by – 0.41% at 7,615.14

KSA Market

The market closed down today by - 0.08% at 11,061.50

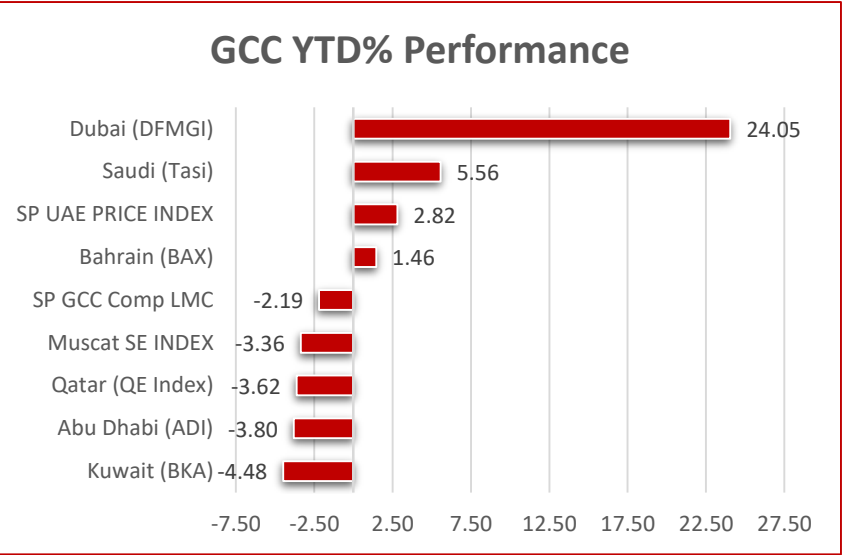


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/E	P/B	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.916	-0.11	-0.97	-0.43	-2.03	-10.78	13.84	1.76	3.69	7.26
KFH	0.739	-0.40	-1.07	-0.81	-0.81	-1.23	19.24	1.89	2.28	10.91
ZAIN	0.503	-0.20	-0.40	-1.37	-2.90	-10.66	10.36	1.76	6.96	2.18
BOUBYAN BANK	0.607	-0.49	-2.41	-0.49	-5.16	-19.37	40.17	2.49	0.93	2.41
AGILITY	0.557	-1.24	-1.94	-3.13	-10.59	-22.64	20.68	0.75	0.00	1.49
Saudi Arabia										
ARAMCO	34.30	0.00	1.03	-1.72	6.36	17.54	16.34	5.43	3.94	8,300.60
SABIC	84.00	-0.59	-1.75	-4.98	-4.76	-6.04	63.57	1.43	4.52	252.00
STC	38.15	-0.78	-0.65	-4.15	-12.30	4.23	15.36	2.52	4.19	190.75
AL-RAJHI BANK	69.00	0.00	-3.36	-4.43	-5.48	-8.24	16.18	2.67	2.57	276.00
NCB	33.45	-0.45	-1.76	-6.43	-9.10	-11.25	10.56	1.17	3.88	200.70
Abu Dhabi										
ETISALAT.AD	20.40	-0.39	0.49	2.82	-8.93	-10.76	18.01	4.25	3.92	177.41
FAB.AD	13.50	0.00	-2.03	-1.32	-1.03	-21.05	11.44	1.28	3.85	149.14
EMIRATES NBD	18.50	3.93	6.63	13.15	24.58	42.31	6.01	1.19	3.24	116.85
DB ISLAMIC DB	5.71	0.71	0.53	1.24	4.39	0.18	7.60	0.99	5.25	41.34
EMAR.DU	7.49	5.20	6.24	6.09	16.85	27.82	8.38	0.93	3.34	66.20
Qatar										
QNB	15.180	0.07	-1.11	-2.69	-1.56	-15.67	10.17	1.36	3.95	140.09
INDUSTREIS QAT	14.020	0.50	2.26	13.43	24.84	9.45	16.24	2.27	7.85	84.75
QA ISLAMIC BK	18.690	-0.69	-0.59	-3.26	5.53	0.70	11.16	1.60	3.34	44.12
MASRAF AL RAYA	2.216	-1.60	-0.40	-0.18	-13.54	-30.12	19.87	0.86	4.51	20.59
MESAIEED PETRO	1.797	-0.11	-1.70	-2.34	-5.42	-15.51	17.18	1.36	6.12	22.56
Oman										
BANK MUSCAT	0.284	-0.35	-0.35	-0.35	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.007	0.20	-0.20	-2.23	1.51	9.46	32.57	1.20	3.23	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	0.305	0.00	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
13-September-23	24.30%	14.41%	0.07%	2.11%	0.24%	5.11%	17.54%	13.46%	6.06%	4.86%
20-September-23	24.33%	14.65%	0.07%	1.91%	0.23%	5.13%	17.54%	13.44%	6.08%	4.90%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.34 %The leading sector bottom performance indices today are Real Estate -0.79 %, Telecom -0.56 % Utilities -0.52 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by - 0.59 %, STC has a negative performance today by – 0.78 %, Al Rajhi Bank has a flat performance today

U.A.E

ETISALAT .AD has a negative performance today by - 0.39 %, FAB.AD has a flat performance today



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