



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, August 21st 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

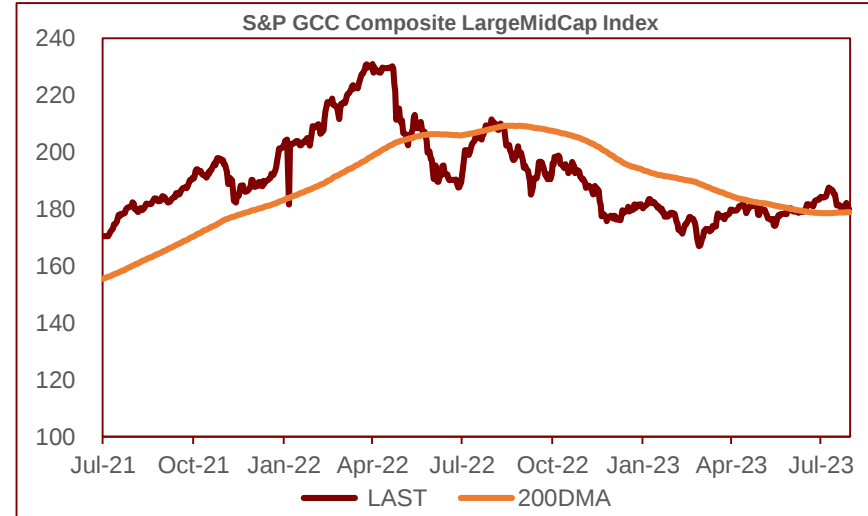


Market Watch

Monday, August 21, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,408.45	-0.81	-0.14	-2.43	-0.44	8.88	10,433 SAR	1.94	17.85
Qatar (QE Index)	10,459.78	-1.11	-2.57	-4.59	3.82	-2.07	552 QAR	1.39	12.52
Dubai (DFMGI)	4,053.64	0.08	0.12	-0.14	6.90	21.51	580 AED	1.60	22.81
Abu Dhabi (ADI)	9,776.34	-0.25	-1.29	-0.11	2.37	-4.26	1,435 AED	1.83	18.95
Bahrain (BAX)	1,962.88	0.06	-0.48	-1.09	0.26	3.57	3 BHD	2.07	18.00
MUSCAT SE INDEX	4,775.10	0.05	0.38	-0.02	0.14	-1.70	5 OMR	0.99	12.01
SP GCC Comp LMC	179.51	-0.73	-0.72	-3.19	0.28	0.41			
SP UAE PRICE INDEX	139.45	-0.38	-1.22	-1.32	3.80	1.42			
Developed Markets									
MSCI World Index	2,910.52	0.45	-2.49	-5.02	-1.89	11.83			
U.S. (S&P 500)	4,399.77	0.69	-1.55	-4.12	-1.14	14.59			
U.K. (FTSE 100)	7,257.82	-0.06	-4.74	-5.74	-3.63	-2.60			
Japan (Topix)	2,241.49	0.19	-2.69	-3.49	-2.06	18.49			
Emerging Markets									
MSCI EM Index	959.79	-0.48	-4.82	-8.32	-3.00	0.36			
China (SSE Composite)	3,092.98	-1.24	-4.96	-6.02	-3.41	0.12			
India (Sensex)	65,216.09	0.41	-0.72	-1.97	0.77	7.19			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,004.99	-1.34	-2.00	-3.43	-0.35	-3.94	45.34 KWD	1.64	21.08
Kuwait Premier Index	7,699.66	-1.40	-2.05	-4.48	-1.40	-5.13	35.02 KWD	1.61	20.15
Kuwait Main Index	5,676.85	-1.11	-1.81	0.83	3.90	1.43	10.33 KWD	1.70	24.26
NIC 50	9,294.93	1.96	-2.06	-4.49	-1.41	2.32	28.60 KWD	1.59	19.15
Kuwait Sector									
Banking	1,696.40	-1.62	-2.58	-4.11	-0.55	-5.44	28.63 KWD	1.14	21.15
Telecom	1,102.73	-0.80	0.22	-0.97	-1.31	-6.66	3.39 KWD	1.35	8.85
Industrials	954.04	-1.08	-3.41	-4.73	-4.89	-11.57	3.37 KWD	0.80	18.32
Financial services	1,258.23	-1.01	-1.35	-2.49	2.55	0.08	3.64 KWD	0.77	31.19
Real estate	1,221.76	-1.37	-0.95	-2.27	1.18	1.08	2.64 KWD	0.60	26.32
Basic materials	855.02	-0.26	0.51	-3.18	-5.77	-1.17	0.76 KWD	1.98	9.69
Health care	478.19	1.48	4.98	5.26	6.40	3.54	0.24 KWD	1.00	11.42
Consumer services	613.76	0.17	8.60	-1.27	-0.22	27.88	0.78 KWD	0.95	13.16
Insurance	2,224.68	-0.09	1.26	2.09	5.43	43.45	0.91 KWD	0.91	10.23
Consumer Disc	1,651.66	-1.22	-2.62	-4.03	5.87	11.09	0.19 KWD	1.14	38.94
Energy	989.20	0.21	-1.97	-0.97	-2.96	-13.12	0.21 KWD	0.69	4.49
Technology	566.72	0.00	-4.88	-1.77	-16.15	-18.60	0.01 KWD	0.70	0.00
Utilities	505.26	-0.52	-1.03	-4.95	-4.00	2.13	0.21 KWD	1.93	15.72



What Move the GCC markets

Oil Prices

Oil prices edged higher on Monday as tighter supply reflected in fewer exports from Saudi Arabia and Russia and high heating oil prices outweighed concerns about global demand growth amid high interest rates. Brent crude climbed 76 cents to \$85.56 a barrel.

Kuwait Market

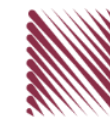
The market closed down by - 1.34% at 7,004.99 value traded 33.9 million KD, Premier market value reached 26.2 million KD down - 1.40% at 7,699.66

KSA Market

The market closed down today by - 0.81% at 11,408.45

DAILY MARKETS WRAP,

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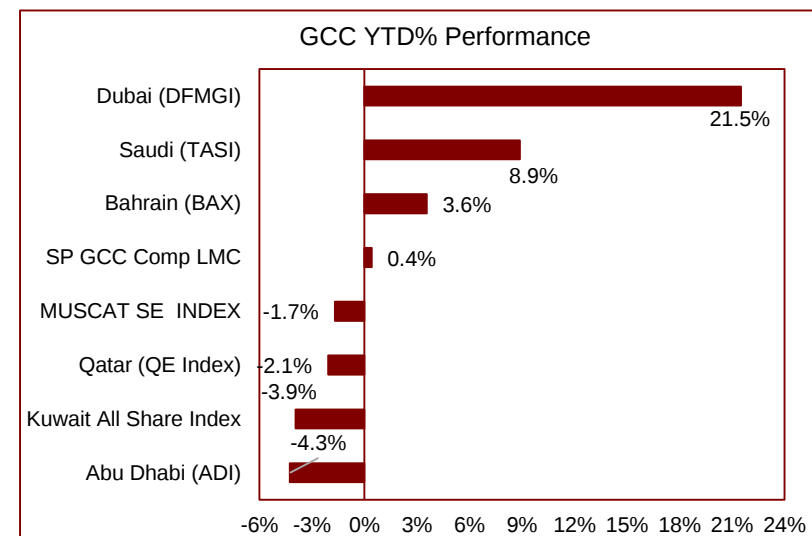
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.915	-1.61	-1.61	-4.89	-2.14	-10.88	7.26 KWD	1.76	27.00
KFH	0.746	-1.32	-2.48	-5.45	0.13	-0.29	11.03 KWD	1.91	32.00
Zain	0.513	-0.58	-0.39	-1.54	-0.97	-8.88	2.22 KWD	1.73	10.94
BOUBAYAN BANK	0.608	-1.94	-2.56	-1.94	-5.00	-19.24	2.41 KWD	2.49	34.00
Agility	0.593	-1.82	-6.02	-5.87	-4.82	-17.64	1.59 KWD	0.80	22.01
Saudi Arabia									
ARAMCO	34.45	-1.57	1.32	6.33	6.82	18.05	8,337.79 SAR	5.45	17.03
SABIC	87.30	-0.80	0.00	1.87	-1.02	-2.35	261.93 SAR	1.48	35.00
STC	40.20	-1.35	-2.90	-5.19	-7.59	9.84	201.02 SAR	2.65	16.38
AL-RAJHI BANK	72.50	-0.82	0.69	-2.82	-0.68	-3.59	290.03 SAR	2.81	17.15
NCB	35.75	-0.42	-0.69	-7.26	-2.85	-5.15	214.52 SAR	1.25	11.36
United Arab Emirates									
ETISALAT.AD	21.00	-1.41	-4.98	-6.25	-6.25	-8.14	206.60 AED	5.10	21.10
FAB.AD	13.78	-1.15	-3.64	-5.87	1.03	-19.42	152.25 AED	1.31	11.68
EMIRATES NBD	17.10	1.18	4.91	0.59	15.15	31.54	108.03 AED	1.10	5.55
DB ISLAMIC BK	5.58	-1.24	-3.13	-2.96	2.01	-2.11	40.41 AED	0.97	7.43
EMAAR PROPERT	6.76	-0.29	-1.31	0.00	5.46	15.36	59.76 AED	0.84	7.56
Qatar									
QNB	16.06	-0.74	-3.02	-5.42	4.15	-10.78	148.35 QAR	1.44	10.76
INDUSTRIES QAT	12.89	-0.92	-4.52	-3.30	14.78	0.62	77.99 QAR	2.08	14.26
QA ISLAMIC BK	19.79	-2.13	-2.27	-6.43	11.74	6.63	46.76 QAR	1.70	11.82
MASRAF AL RAYA	2.33	-2.88	-6.62	-7.25	-9.17	-26.58	21.65 QAR	0.90	20.88
MESAIEED PETRO	1.88	-1.05	-2.49	-3.54	-1.00	-11.57	23.63 QAR	1.42	17.98
OMAN									
BANK MUSCAT	0.281	0.00	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.031	16.10	3.10	3.62	3.93	12.07	0.78 OMR	1.23	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.53 QAR	0.73	14.93
NAT BANK OF OMAN	0.294	-0.34	0.00	1.73	5.00	1.73	0.48 QAR	0.74	12.71
OMINVEST	0.390	1.30	2.63	0.26	3.17	-7.14	0.26 QAR	0.87	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 -1.34 %The leading sector bottom performance indices today are Banking -1.62 % Real estate -1.37 % Consumer Disc -1.22 % respectively

KSA

Saudi Armco has a negative performance today by -1.57 %, SABIC has a negative performance today by -0.80 %, STC has a negative performance today by -1.35 %, Al Rajhi Bank has a negative performance today by -0.82 %

U.A.E

ETISALAT .AD has a negative performance today by -1.41 %, FAB.AD has a negative performance today by -1.15 %



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