



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, September 21st 2023





Thursday, September 21, 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)	10,949.42	-1.01	-1.84	-4.71	-4.45	4.49	2.00	17.80	3.51	11,164.82
Qatar (QE Index)	10,322.96	0.27	0.04	1.26	2.47	-3.35	1.24	12.42	4.76	526.17
Dubai (DFMGI)	4,168.55	-0.27	3.10	2.10	9.93	24.95	1.52	10.24	4.26	598.99
Abu Dhabi (ADI)	9,849.41	0.03	-0.31	0.40	3.13	-3.54	2.54	15.82	2.22	2,786.53
Bahrain (BAX)	1,929.51	0.34	-0.10	-1.16	-1.45	1.81	0.76	9.35	6.02	7.01
Muscat SE INDEX	4,676.84	-0.37	-1.04	-2.54	-1.92	-3.72	0.84	10.17	4.69	6.55
SP GCC Comp LMC	174.00	-0.01	-1.22	-2.78	-2.80	-2.67	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.70	-0.03	1.72	2.88	6.22	3.78				
Developed Markets										
MSCI World Index	2,879.85	-0.22	-2.74	-3.56	-2.93	10.65				
U.S. (S&P 500)	4,320.06	-0.23	-2.93	-4.16	-2.93	12.52	3.85	22.08	2.10	38,293.13
U.K. (FTSE 100)	7,683.91	0.07	-0.36	3.29	2.02	3.12	1.60	10.86	3.81	2,074.03
Japan (topix)	2,376.27	-0.30	-2.15	1.90	3.83	25.61	1.38	14.14	2.16	858,156.56
Emerging Markets										
MSCI EM Index	964.24	0.84	-2.11	-1.64	-2.55	0.82				
China (SSE Composite)	3,132.43	1.55	0.47	0.40	-2.17	1.40	1.36	12.00		44,025.04
India (Sensex)	66,009.15	-0.33	-2.70	1.82	1.99	8.49	4.26	22.68	1.22	129,145.00
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,936.46	-0.42	-1.32	-0.99	-1.33	-4.88	1.46	15.51	3.27	45.05
Kuwait Premier Index	7,582.36	-0.43	-1.59	-1.47	-2.91	-6.57	1.62	17.10	3.11	35.97
Kuwait Main Index	5,738.44	-0.38	-0.29	0.81	5.03	2.53	1.04	11.03	3.91	9.08
Kuwait Sector										
Banking	1,689.82	-0.20	-1.10	-0.50	-0.94	-5.80	1.71	17.69	2.72	28.67
Telecom	1,082.46	-1.49	-2.46	-2.00	-3.13	-8.38	1.64	10.07	6.52	3.32
Industrials	923.76	-1.08	-1.66	-1.80	-7.91	-14.38	1.03	15.98	3.03	3.25
Financial Services	1,252.39	-0.66	-2.04	-1.38	2.07	-0.39	0.99	14.45	3.95	3.98
Real Estate	1,198.08	-0.25	-1.86	-1.39	-0.78	-0.88	0.93	14.67	2.10	2.57
Basic Materials	835.85	-0.45	-2.83	-5.07	-7.88	-3.38	1.46	9.33	9.35	0.47
Health Care	475.41	-2.36	-1.51	-1.51	5.78	2.94	1.72	12.22	1.75	0.24
Consumer Staples	611.06	-0.34	-1.38	0.40	-0.66	27.32	1.40	76.99	2.02	0.19
Insurance	2,235.24	0.02	1.14	-0.74	5.94	44.13	1.25	7.44	4.18	0.90
Consumer Discretionary	1,554.68	0.16	0.83	-2.84	-0.34	4.56				
Energy	976.99	0.04	-0.78	-1.86	-4.16	-14.19	0.77	9.82	5.20	0.20
Technology	534.71	-4.55	-4.55	-8.13	-20.88	-23.20	0.66			0.01
Utilities	505.26	0.52	-1.54	-1.03	-4.00	2.13				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

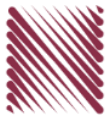
Oil prices fell on Thursday, after posting the largest decline in a month in the previous session, as U.S. interest rate hike expectations offset the impact of drawdowns in U.S. crude stockpiles. Brent futures for November delivery were down 78 cents, or 0.8%, to \$92.75 a barrel.

Kuwait Market

The market closed down by – 0.42% at 6,936.46 value traded 49.6 million KD, Premier market value reached 30.8 million KD down by – 0.43% at 7,582.36

KSA Market

The market closed down today by – 1.01% at 10,949.42



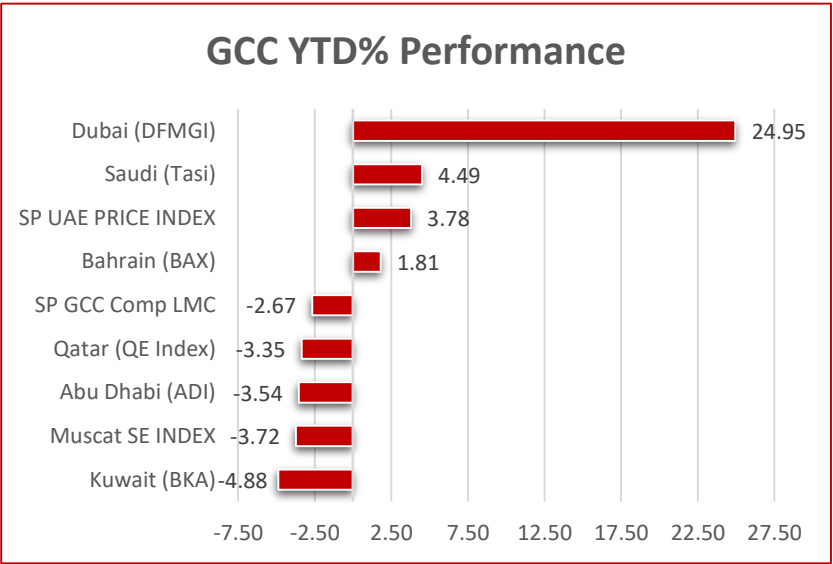
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.914	-0.22	-1.19	-0.65	-2.25	-10.97	1.76	13.81	3.70	7.26
KFH	0.738	-0.14	-1.20	-0.94	-0.94	-1.36	1.89	19.22	2.28	10.90
ZAIN	0.496	-1.39	-1.78	-2.75	-4.25	-11.90	1.73	10.22	7.06	2.15
BOUBYAN BANK	0.605	-0.33	-2.73	-0.82	-5.47	-19.64	2.48	40.04	0.94	2.40
AGILITY	0.550	-1.26	-3.17	-4.35	-11.72	-23.61	0.74	20.42	0.00	1.47
Saudi Arabia										
ARAMCO	34.10	-0.58	0.44	-2.29	5.74	16.85	5.40	16.25	3.96	8,252.20
SABIC	83.00	-1.19	-2.92	-6.11	-5.90	-7.16	1.41	62.82	4.58	249.00
STC	38.00	-0.39	-1.04	-4.52	-12.64	3.83	2.51	15.30	4.21	190.00
AL-RAJHI BANK	68.00	-1.45	-4.76	-5.82	-6.85	-9.57	2.64	15.95	2.61	272.00
NCB	33.10	-1.05	-2.79	-7.41	-10.05	-12.18	1.16	10.45	3.92	198.60
Abu Dhabi										
ETISALAT.AD	20.36	1.18	1.48	3.83	-8.04	-9.89	4.29	18.19	3.88	179.15
FAB.AD	13.56	0.00	-1.60	-0.88	-0.59	-20.70	1.29	11.49	3.83	149.81
EMIRATES NBD	18.10	0.28	4.61	11.01	22.22	39.62	1.17	5.89	3.31	114.65
DB ISLAMIC DB	5.80	1.72	3.87	4.61	7.86	3.51	1.02	7.85	5.08	42.72
EMAR.DU	7.97	-2.89	9.79	9.63	20.75	32.08	0.96	8.66	3.23	68.41
Qatar										
QNB	15.240	0.40	-0.72	-2.31	-1.17	-15.33	1.37	10.21	3.94	140.76
INDUSTREIS QAT	14.150	0.93	3.21	14.48	26.00	10.46	2.29	16.40	7.77	85.61
QA ISLAMIC BK	18.640	-0.27	-0.85	-3.52	5.25	0.43	1.60	11.13	3.35	44.05
MASRAF AL RAYA	2.209	-0.32	-0.72	-0.50	-13.81	-30.34	0.86	19.81	4.53	20.54
MESAIEED PETRO	1.810	0.72	-0.98	-1.63	-4.74	-14.90	1.37	17.31	6.08	22.74
Oman										
BANK MUSCAT	0.284	0.00	-0.35	-0.35	2.90	3.27	0.95	11.18	5.28	2.13
OMANTEL	1.000	-0.70	-0.89	-2.91	0.81	8.70	1.20	32.34	3.25	0.75
BANK DHOFAR	0.170	0.00	0.00	-2.86	-1.73	-2.86	0.71	19.52	2.94	0.51
NAT BANK OF OMAN	0.305	0.00	1.67	3.04	8.93	5.54	0.76	11.16	2.43	0.50
OMINVEST	0.394	0.00	-1.50	-1.01	4.23	-6.19	0.88	5.79	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 -0.42 %The leading sector bottom performance indices today are Technology -4.55 %, Health Care -2.36 % Telecom -1.49 % respectively

KSA

Saudi Armco has a negative performance today by -0.58%, SABIC has a negative performance today by - 1.19 %, STC has a negative performance today by -0.39 %, Al Rajhi Bank has a negative performance today by -1.45%

U.A.E

ETISALAT .AD has a positive performance today by + 1.18 %, FAB.AD has a flat performance today.



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