



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

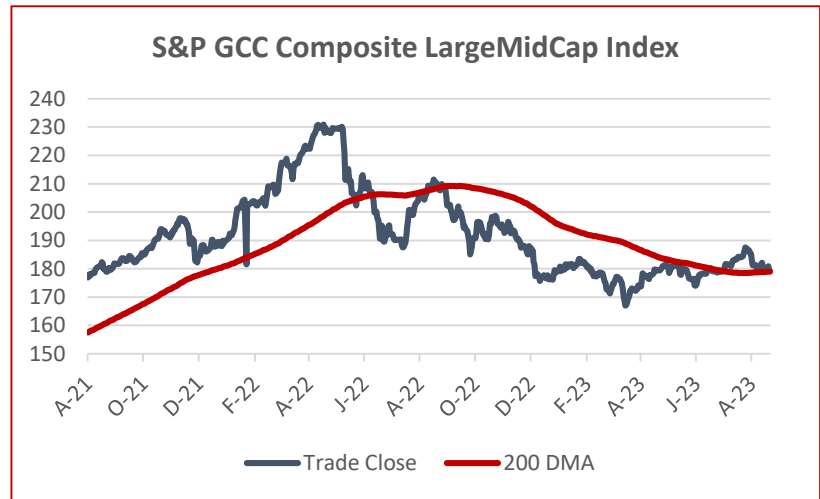
Tuesday, August 22st 2023





Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,377.55	-0.27	-0.64	-2.69	-0.71	8.58	2.08	18.59	3.35	11,371.11
Qatar (QE Index)	10,454.75	-0.05	-1.11	-4.64	3.77	-2.12	1.26	12.57	4.70	534.56
Dubai (DFMGI)	4,068.52	0.37	0.44	0.23	7.29	21.96	1.47	9.90	4.42	580.52
Abu Dhabi (ADI)	9,766.47	-0.10	-0.35	-0.21	2.26	-4.35	2.46	15.45	2.24	2,740.06
Bahrain (BAX)	1,964.37	0.08	0.60	-1.02	0.33	3.65	0.77	9.47	5.92	7.15
Muscat SE INDEX	4,772.59	-0.05	-0.26	-0.07	0.09	-1.75	0.86	10.37	4.96	6.65
SP GCC Comp LMC	179.24	-0.15	-0.52	-3.34	0.13	0.26	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.34	-0.08	-0.46	-1.40	3.72	1.34				
Developed Markets										
MSCI World Index	2,909.19	-0.05	0.40	-5.06	-1.94	11.78				
U.S. (S&P 500)	4,387.55	-0.28	0.41	-4.39	-1.41	14.27	3.90	22.48	2.04	38,690.65
U.K. (FTSE 100)	7,270.76	0.18	0.11	-5.57	-3.46	-2.43	1.54	10.21	4.06	1,964.48
Japan (topix)	2,265.71	1.08	1.27	-2.45	-1.00	19.77	1.32	13.49	2.26	818,883.13
Emerging Markets										
MSCI EM Index	966.69	0.72	0.23	-7.66	-2.30	1.08				
China (SSE Composite)	3,120.33	0.88	-0.37	-5.19	-2.55	1.01	1.36	12.00		44,025.04
India (Sensex)	65,220.03	0.01	0.42	-1.97	0.77	7.20	4.13	22.75	1.23	128,548.83

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,011.68	0.10	-1.58	-3.34	-0.26	-3.85	1.47	15.83	3.23	45.36
Kuwait Premier Index	7,716.78	0.22	-1.36	-4.27	-1.19	-4.92	1.64	17.46	3.06	36.48
Kuwait Main Index	5,654.92	-0.39	-2.38	0.44	3.50	1.04	1.03	11.13	3.97	8.88
Kuwait Sector										
Banking	1,702.17	0.34	-1.79	-3.78	-0.21	-5.11	1.71	17.77	2.71	28.66
Telecom	1,103.22	0.04	-0.23	-0.92	-1.27	-6.62	1.67	10.49	6.40	3.38
Industrials	951.99	-0.21	-2.18	-4.93	-5.09	-11.76	1.07	16.96	2.94	3.35
Financial Services	1,242.06	-1.29	-2.56	-3.74	1.23	-1.21	1.00	15.21	3.89	4.00
Real Estate	1,224.09	0.19	-0.70	-2.08	1.37	1.27	0.95	15.45	2.07	2.62
Basic Materials	868.79	1.61	1.71	-1.62	-4.25	0.43	1.49	9.54	9.14	0.48
Health Care	482.72	0.95	0.95	6.26	7.40	4.52	1.73	12.67	1.74	0.24
Consumer Staples	612.09	-0.27	0.17	-1.54	-0.49	27.53	1.41	77.88	2.01	0.19
Insurance	2,204.01	-0.93	-1.01	1.14	4.45	42.12	1.26	7.44	4.20	0.90
Consumer Discretionary	1,649.55	-0.13	-1.21	-4.15	5.74	10.94				
Energy	1,006.07	1.71	1.85	0.72	-1.30	-11.63	0.79	9.93	5.13	0.21
Technology	566.72	0.00	0.00	-1.77	-16.15	-18.60	0.70			0.01
Utilities	510.53	1.04	0.00	-3.96	-3.00	3.19				



What Move the GCC markets

Oil Prices

Oil prices eased in early trade on Wednesday, weighed down by fears U.S. interest rates could stay higher for longer and economic growth could slow further in top crude importer China and hurt fuel demand. Brent crude dipped 17 cents, or 0.2%, to \$83.86 a barrel.

Kuwait Market

The market closed up by 0.10% at 7,011.68 value traded 30.2 million KD, Premier market value reached 22.9 million KD up 0.22% at 7,716.78

KSA Market

The market closed down today by – 0.27% at 11,377.55

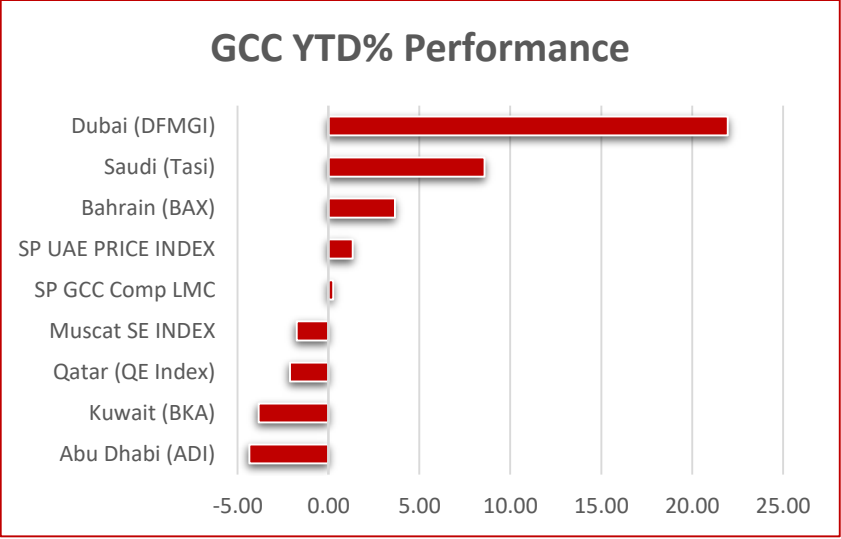


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	925.000	1.09	-0.96	-3.85	-1.07	-9.90	13.98	1.78	3.66	7.35
KFH	747.000	0.13	-1.32	-5.32	0.27	-0.16	19.45	1.91	2.25	11.06
ZAIN	513.000	0.00	-0.19	-1.54	-0.97	-8.88	10.94	1.73	6.82	2.22
BOUBYAN BANK	608.000	0.00	-2.25	-1.94	-5.00	-19.24	40.24	2.49	0.93	2.42
AGILITY	592.000	-0.17	-3.58	-6.03	-4.98	-17.78	21.97	0.80	0.00	1.59
Saudi Arabia										
ARAMCO	34.400	-0.15	-1.85	6.17	6.67	17.88	16.39	5.44	3.93	8,325.24
SABIC	88.000	0.80	1.73	2.68	-0.23	-1.57	66.60	1.49	4.32	264.01
STC	40.450	0.62	-0.49	-4.60	-7.01	10.52	16.29	2.67	3.96	202.26
AL-RAJHI BANK	72.700	0.28	-0.41	-2.55	-0.41	-3.32	17.05	2.82	2.44	290.82
NCB	35.500	-0.70	0.00	-7.91	-3.53	-5.81	11.21	1.24	3.66	213.01
Abu Dhabi										
ETISALAT.AD	20.700	-1.43	-2.82	-7.59	-7.59	-9.45	18.27	4.31	3.86	180.02
FAB.AD	13.700	-0.58	-1.72	-6.42	0.44	-19.88	11.61	1.30	3.80	151.35
EMIRATES NBD	17.100	0.00	1.18	0.59	15.15	31.54	5.55	1.10	3.51	108.00
DB ISLAMIC DB	5.660	1.43	0.18	-1.57	3.47	-0.70	7.53	0.98	5.30	40.98
EMAR.DU	6.770	0.15	-0.15	0.15	5.62	15.53	7.58	0.84	3.69	60.19
Qatar										
QNB	16.080	0.12	-0.86	-5.30	4.28	-10.67	10.77	1.44	3.73	148.52
INDUSTREIS QAT	12.850	-0.31	-1.15	-3.60	14.43	0.31	14.89	2.08	8.56	77.74
QA ISLAMIC BK	19.890	0.51	-1.04	-5.96	12.31	7.17	11.88	1.71	3.14	47.05
MASRAF AL RAYA	2.317	-0.47	-5.04	-7.69	-9.60	-26.93	20.78	0.90	4.32	21.58
MESAIEED PETRO	1.900	1.01	-0.58	-2.56	0.00	-10.67	18.17	1.44	5.79	23.87
Oman										
BANK MUSCAT	0.281	0.00	0.00	0.36	1.81	2.18	11.06	0.94	5.34	2.11
OMANTEL	1.020	-1.07	0.10	2.51	2.82	10.87	32.99	1.22	5.39	0.77
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	20.09	0.73	2.86	0.52
NAT BANK OF OMAN	0.298	1.02	0.00	3.11	6.43	3.11	10.90	0.74	2.48	0.48
OMINVEST	0.390	0.00	1.30	0.26	3.17	-7.14	5.73	0.87	3.85	0.26

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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by 0.10%. The leading sector bottom performance indices today are financial services -1.29 % Insurance -0.93 % Industrials -0.21 % respectively

KSA
Saudi Armco has a negative performance today by -0.15 %, SABIC has a positive performance today by 0.80 %, STC has a positive performance today by 0.62%, Al Rajhi Bank has a positive performance today by 0.28%

U.A.E
ETISALAT .AD has a negative performance today by -1.43 %, FAB.AD has a negative performance today by -0.58 %



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