

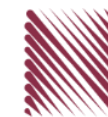


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 23rd 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,367.07	-0.09	-0.74	-2.78	-0.80	8.48	2.08	18.54	3.36	11,392.89
Qatar (QE Index)	10,332.38	-1.17	-2.26	-5.75	2.56	-3.26	1.24	12.43	4.76	527.78
Dubai (DFMGI)	4,099.49	0.76	1.21	0.99	8.11	22.88	1.49	9.99	4.36	584.83
Abu Dhabi (ADI)	9,729.10	-0.38	-0.73	-0.59	1.87	-4.72	2.45	15.37	2.25	2,730.21
Bahrain (BAX)	1,954.14	-0.52	0.08	-1.53	-0.19	3.11	0.77	9.41	5.96	7.11
Muscat SE INDEX	4,775.01	0.05	-0.21	-0.02	0.14	-1.70	0.87	10.39	4.95	6.66
SP GCC Comp LMC	178.82	-0.24	-0.75	-3.56	-0.11	0.02	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.66	0.23	-0.23	-1.18	3.95	1.57				

Developed Markets

MSCI World Index	2,937.70	0.98	1.39	-4.13	-0.98	12.87				
U.S. (S&P 500)	4,436.01	1.10	1.52	-3.33	-0.32	15.54	3.90	22.41	2.05	38,628.18
U.K. (FTSE 100)	7,320.53	0.68	0.80	-4.92	-2.80	-1.76	1.55	10.28	4.03	1,977.67
Japan (topix)	2,277.05	0.50	1.78	-1.96	-0.50	20.37	1.33	13.56	2.25	823,127.24

Emerging Markets

MSCI EM Index	970.20	0.36	0.60	-7.33	-1.95	1.45				
China (SSE Composite)	3,078.40	-1.34	-1.71	-6.46	-3.86	-0.35	1.36	12.00		44,025.04
India (Sensex)	65,433.30	0.33	0.75	-1.64	1.10	7.55	4.14	22.83	1.23	128,865.01

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,029.86	0.26	-1.32	-3.09	0.00	-3.60	1.48	15.84	3.23	45.50
Kuwait Premier Index	7,729.84	0.17	-1.20	-4.11	-1.02	-4.75	1.64	17.50	3.06	36.55
Kuwait Main Index	5,689.03	0.60	-1.79	1.05	4.13	1.65	1.03	11.13	3.97	8.94
Kuwait Sector										
Banking	1,709.18	0.41	-1.38	-3.38	0.20	-4.72	1.73	17.82	2.70	28.85
Telecom	1,099.56	-0.33	-0.56	-1.25	-1.60	-6.93	1.67	10.50	6.40	3.39
Industrials	955.75	0.39	-1.79	-4.56	-4.72	-11.41	1.07	16.92	2.95	3.35
Financial Services	1,249.84	0.63	-1.95	-3.14	1.86	-0.59	0.99	15.09	3.94	3.95
Real Estate	1,220.12	-0.32	-1.02	-2.40	1.04	0.94	0.95	15.47	2.06	2.63
Basic Materials	861.67	-0.82	0.88	-2.43	-5.04	-0.40	1.51	9.69	9.00	0.49
Health Care	482.72	0.00	0.95	6.26	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	608.67	-0.56	-0.39	-2.09	-1.04	26.82	1.40	77.14	2.01	0.19
Insurance	2,216.17	0.55	-0.47	1.70	5.03	42.90	1.25	7.37	4.24	0.89
Consumer Discretionary	1,631.06	-1.12	-2.32	-5.22	4.55	9.70				
Energy	1,006.17	0.01	1.86	0.73	-1.29	-11.62	0.80	10.19	5.05	0.21
Technology	566.72	0.00	0.00	-1.77	-16.15	-18.60	0.70			0.01
Utilities	507.89	-0.52	-0.52	-4.46	-3.50	2.66				

S&P GCC Composite LargeMidCap Index



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

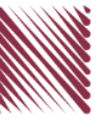
The market closed up by 0.26% at 7,029.86 value traded 27.0 million KD, Premier market value reached 21.3 million KD up 0.17% at 7,729.84

KSA Market

The market closed down today by – 0.09% at 11,367.07

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



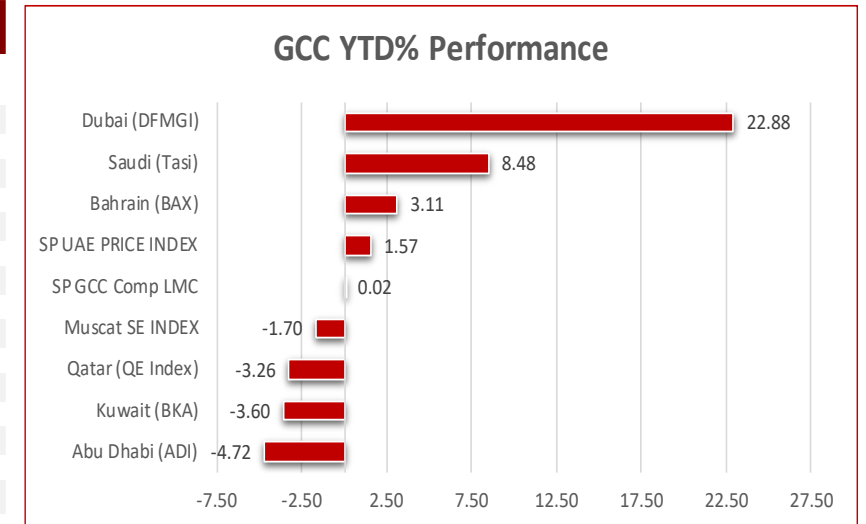
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.929	0.43	-0.54	-3.43	-0.64	-9.51	14.04	1.79	3.64	7.37
KFH	0.749	0.27	-1.06	-5.07	0.54	0.11	19.51	1.91	2.25	11.06
ZAIN	0.511	-0.39	-0.58	-1.92	-1.35	-9.24	10.89	1.72	6.85	2.21
BOUBYAN BANK	0.608	0.00	-2.25	-1.94	-5.00	-19.24	40.24	2.49	0.93	2.41
AGILITY	0.597	0.84	-2.77	-5.24	-4.17	-17.08	22.16	0.80	0.00	1.60
Saudi Arabia										
ARAMCO	34.50	0.29	-1.57	6.48	6.98	18.22	16.44	5.46	3.92	8,349.00
SABIC	88.00	0.00	1.73	2.68	-0.23	-1.57	66.60	1.49	4.32	264.00
STC	40.00	-1.11	-1.60	-5.66	-8.05	9.29	16.11	2.64	4.00	200.00
AL-RAJHI BANK	72.50	-0.28	-0.68	-2.82	-0.68	-3.59	17.00	2.81	2.45	290.00
NCB	35.25	-0.70	-0.70	-8.56	-4.21	-6.47	11.13	1.23	3.68	211.50
Abu Dhabi										
ETISALAT.AD	20.06	-3.09	-5.82	-10.45	-10.45	-12.25	17.71	4.18	3.99	174.46
FAB.AD	13.60	-0.73	-2.44	-7.10	-0.29	-20.47	11.52	1.29	3.82	150.25
EMIRATES NBD	17.30	1.17	2.37	1.76	16.50	33.08	5.62	1.11	3.47	109.28
DB ISLAMIC DB	5.62	-0.71	-0.53	-2.26	2.74	-1.40	7.48	0.97	5.34	40.69
EMAR.DU	7.03	3.84	3.69	3.99	9.67	19.97	7.87	0.88	3.56	62.14
Qatar										
QNB	15.860	-1.37	-2.22	-6.60	2.85	-11.89	10.63	1.42	3.78	146.50
INDUSTREIS QAT	12.480	-2.88	-4.00	-6.38	11.13	-2.58	14.46	2.02	8.81	75.51
QA ISLAMIC BK	19.790	-0.50	-1.54	-6.43	11.74	6.63	11.82	1.70	3.16	46.76
MASRAF AL RAYA	2.274	-1.86	-6.80	-9.40	-11.28	-28.29	20.39	0.88	4.40	21.15
MESAIEED PETRO	1.890	-0.53	-1.10	-3.08	-0.53	-11.14	18.07	1.43	5.82	23.75
Oman										
BANK MUSCAT	0.283	0.71	0.71	1.07	2.54	2.91	11.14	0.95	5.30	2.12
OMANTEL	1.017	-0.29	-0.20	2.21	2.52	10.54	32.89	1.22	5.41	0.76
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	0.00	0.00	3.11	6.43	3.11	10.90	0.74	2.48	0.48
OMINVEST	0.389	-0.26	1.04	0.00	2.91	-7.38	5.71	0.87	3.86	0.26

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-August 23	24.40%	15.02%	0.07%	2.19%	0.24%	5.10%	17.55%	13.62%	6.15%	4.63%
23-August 23	24.37%	15.00%	0.07%	2.21%	0.23%	5.13%	17.55%	13.60%	6.12%	4.67%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.26%. The leading sector top performance indices today are financial services + 0.63 % Insurance + 0.55 % Banking + 0.41 % respectively

KSA

Saudi Armco has a positive performance today by + 0.29 %, SABIC has a flat performance today, STC has a negative performance today by - 1.11%, Al Rajhi Bank has a negative performance today by - 0.28%

U.A.E

ETISALAT .AD has a negative performance today by - 3.09 %, FAB.AD has a negative performance today by - 0.73 %



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