

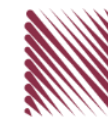


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, July 23rd 2023





Market Watch

Sunday, July 23, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,760.30	-0.07	-0.07	2.63	2.63	12.23	11,039 SAR	2.01	18.48
Qatar (QE Index)	10,494.91	1.83	1.83	4.17	4.17	-1.74	556 QAR	1.42	11.53
Dubai (DFMGI)	3,986.36	-0.89	-0.89	5.13	5.13	19.49	577 AED	1.54	18.54
Abu Dhabi (ADI)	9,629.31	-0.70	-0.70	0.83	0.83	-5.70	1,435 AED	1.84	21.22
Bahrain (BAX)	1,981.90	-0.20	-0.20	1.23	1.23	4.57	9 BHD	6.71	18.00
MUSCAT SE INDEX	4,800.52	-0.19	-0.19	0.68	0.68	-1.17	5 OMR	1.01	13.25
SP GCC Comp LMC	184.39	0.04	0.04	3.01	3.01	3.14			
SP UAE PRICE INDEX	138.06	-0.98	-0.98	2.76	2.76	0.41			
Developed Markets									
MSCI World Index	3,028.71	-0.45	-0.45	2.09	2.09	16.37			
U.S. (S&P 500)	4,536.34	-0.41	-0.41	1.93	1.93	18.15			
U.K. (FTSE 100)	7,663.73	2.82	2.82	1.76	1.76	2.84			
Japan (Topix)	2,262.20	0.44	0.44	-1.15	-1.15	19.58			
Emerging Markets									
MSCI EM Index	1,014.58	-0.74	-0.74	2.54	2.54	6.09			
China (SSE Composite)	3,167.75	-0.94	-0.94	-1.07	-1.07	2.54			
India (Sensex)	66,684.26	-0.17	-0.17	3.04	3.04	9.60			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,325.96	0.08	0.08	4.21	4.21	0.46	47.12 KWD	1.76	18.61
Kuwait Premier Index	8,158.51	-0.03	-0.03	4.47	4.47	0.53	36.86 KWD	1.71	18.43
Kuwait Main Index	5,636.82	0.55	0.55	3.17	3.17	0.72	10.26 KWD	1.96	19.28
NIC 50	9,294.93	1.96	-0.04	4.46	4.46	2.32	28.60 KWD	1.69	17.43
Kuwait Sector									
Banking	1,787.93	0.45	0.45	4.82	4.82	-0.33	29.90 KWD	1.26	19.43
Telecom	1,144.71	-0.41	-0.41	2.44	2.44	-3.11	3.51 KWD	1.41	9.14
Industrials	1,030.64	-0.51	-0.51	2.75	2.75	-4.47	3.63 KWD	0.81	20.64
Financial services	1,304.42	-0.46	-0.46	6.31	6.31	3.75	3.77 KWD	0.79	19.18
Real estate	1,229.96	-0.67	-0.67	1.86	1.86	1.76	2.66 KWD	0.63	22.36
Basic materials	892.96	-1.17	-1.17	-1.59	-1.59	3.22	0.78 KWD	1.42	8.40
Health care	461.54	0.00	0.00	2.69	2.69	-0.07	0.23 KWD	0.99	6.96
Consumer services	617.56	0.41	0.41	0.40	0.40	28.67	0.83 KWD	0.88	14.17
Insurance	2,104.11	-0.08	-0.08	-0.28	-0.28	35.68	0.86 KWD	0.80	10.19
Consumer Disc	1,675.61	-0.85	-0.85	7.41	7.41	12.70	0.19 KWD	1.12	0.00
Energy	1,018.46	-0.28	-0.28	-0.09	-0.09	-10.55	0.21 KWD	0.74	4.49
Technology	614.01	0.00	0.00	-9.15	-9.15	-11.81	0.01 KWD	0.76	0.00
Utilities	531.58	1.00	1.00	1.00	1.00	7.45	0.22 KWD	2.03	16.54

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Monday as traders await more rate hike cues from U.S. and European central banks, with tightening supply and hopes for Chinese stimulus underpinning Brent at \$80 a barrel. Brent crude futures dipped 41 cents, or 0.5%, to \$80.66 a barrel.

Kuwait Market

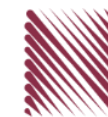
The market closed up by 0.08% at 7,325.96 value traded 41.2 million KD, Premier market value traded reached 33.5 million KD down -0.03% at 8,158.51

KSA Market

The market closed down today by -0.07% at 11,760.30

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



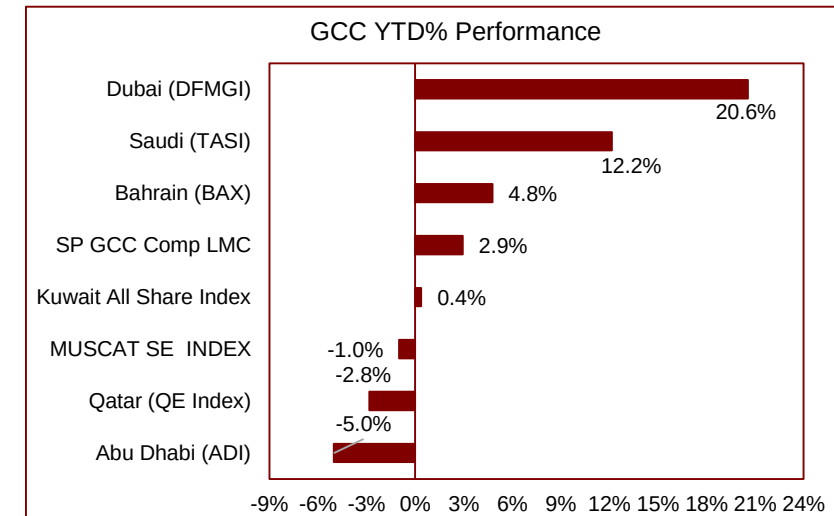
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.980	-0.20	-0.20	4.81	4.81	-4.55	7.76 KWD	1.89	27.00
KFH	0.788	0.64	0.64	5.77	5.77	5.32	11.62 KWD	2.01	32.00
Zain	0.530	-0.38	-0.38	2.32	2.32	-5.86	2.29 KWD	1.79	11.30
BOUBYAN BANK	0.650	-0.15	-0.15	1.56	1.56	-13.66	2.57 KWD	2.67	34.00
Agility	0.652	-0.61	-0.61	4.65	4.65	-9.44	1.74 KWD	0.92	23.50
Saudi Arabia									
ARAMCO	32.35	0.15	0.15	0.31	0.31	10.86	7,832.88 SAR	5.25	13.90
SABIC	85.40	-0.81	-0.81	-3.17	-3.17	-4.47	256.34 SAR	1.37	35.00
STC	45.40	-0.44	-0.44	4.37	4.37	24.04	227.12 SAR	3.03	18.54
AL-RAJHI BANK	71.30	0.85	0.85	-2.33	-2.33	-5.19	285.35 SAR	2.87	16.50
NCB	40.60	0.74	0.74	10.33	10.33	7.72	243.73 SAR	1.41	13.07
United Arab Emirates									
ETISALAT.AD	22.26	-1.15	-1.15	-0.62	-0.62	-2.62	206.60 AED	5.10	21.10
FAB.AD	13.52	-1.60	-1.60	-0.88	-0.88	-20.94	149.36 AED	1.28	11.46
EMIRATES NBD	16.35	-0.30	-0.30	10.10	10.10	25.77	103.27 AED	1.08	6.18
DB ISLAMIC BK	5.65	-0.18	-0.18	3.29	3.29	-0.88	40.91 AED	1.01	7.86
EMAAR PROPERT	6.66	-1.62	-1.62	3.90	3.90	13.65	58.86 AED	0.82	7.02
Qatar									
QNB	16.04	2.23	2.23	4.02	4.02	-10.89	148.20 QAR	1.44	10.75
INDUSTRIES QAT	12.17	1.84	1.84	8.37	8.37	-5.00	73.65 QAR	2.02	10.12
QA ISLAMIC BK	19.36	5.22	5.22	9.32	9.32	4.31	45.76 QAR	1.66	11.56
MASRAF AL RAYA	2.48	0.49	0.49	-3.08	-3.08	-21.67	23.11 QAR	0.96	22.28
MESAIEED PETRO	1.91	-0.47	-0.47	0.68	0.68	-10.06	24.04 QAR	1.47	15.09
OMAN									
BANK MUSCAT	0.279	-1.06	-1.06	1.09	1.09	1.45	2.09 OMR	0.96	8.33
OMANTEL	0.995	12.05	-0.50	0.30	0.30	8.15	0.74 OMR	1.22	7.69
BANK DHOFAR	0.175	0.00	0.00	1.16	1.16	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.299	-0.33	-0.33	6.79	6.79	3.46	0.49 QAR	0.75	12.71
OMINVEST	0.380	0.26	0.26	0.53	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%
19-July 23	24.32%	15.18%	0.06%	1.72%	0.24%	5.09%	17.58%	13.77%	6.17%	4.57%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.08 % The leading sector best performance indices today are Utilities 1 % Banking 0.45 % Consumer services 0.41 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC have negative performance today by -0.81%. STC have negative performance today by -0.44 %, Al Rajhi Bank has a positive performance today by + 0.85 %

U.A.E

ETISALAT .AD have negative performance today by -1.15 %, FAB.AD have negative performance today by -1.6 %



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