



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, July 24th 2023





Market Watch

Monday, July 24, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,801.90	0.35	0.28	2.99	2.99	12.63	11,013 SAR	2.03	18.43
Qatar (QE Index)	10,497.04	0.02	1.85	4.19	4.19	-1.72	555 QAR	1.42	11.56
Dubai (DFMGI)	3,993.83	0.19	-0.70	5.32	5.32	19.72	576 AED	1.54	18.78
Abu Dhabi (ADI)	9,740.48	1.15	0.44	1.99	1.99	-4.61	1,435 AED	1.84	21.33
Bahrain (BAX)	1,986.33	0.22	0.02	1.45	1.45	4.80	9 BHD	6.71	18.00
MUSCAT SE INDEX	4,799.07	-0.03	-0.22	0.65	0.65	-1.20	5 OMR	1.01	13.25
SP GCC Comp LMC	185.46	0.58	0.62	3.60	3.60	3.74			
SP UAE PRICE INDEX	139.97	1.39	0.39	4.19	4.19	1.80			
Developed Markets									
MSCI World Index	3,037.44	0.29	-0.17	2.38	2.38	16.70			
U.S. (S&P 500)	4,554.64	0.40	-0.01	2.34	2.34	18.63			
U.K. (FTSE 100)	7,678.59	0.19	3.02	1.95	1.95	3.04			
Japan (Topix)	2,281.18	0.84	1.28	-0.32	-0.32	20.59			
Emerging Markets									
MSCI EM Index	1,013.45	-0.11	-0.85	2.42	2.42	5.97			
China (SSE Composite)	3,164.16	-0.11	-1.05	-1.18	-1.18	2.42			
India (Sensex)	66,384.78	-0.45	-0.61	2.57	2.57	9.11			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,248.47	-1.06	-0.98	3.11	3.11	-0.60	46.77 KWD	1.75	17.68
Kuwait Premier Index	8,068.40	-1.10	-1.14	3.32	3.32	-0.58	36.56 KWD	1.69	17.32
Kuwait Main Index	5,587.93	-0.87	-0.32	2.28	2.28	-0.16	10.21 KWD	1.96	19.01
NIC 50	9,294.93	1.96	-1.15	3.31	3.31	2.32	28.60 KWD	1.67	16.32
Kuwait Sector									
Banking	1,770.09	-1.00	-0.55	3.77	3.77	-1.33	29.71 KWD	1.25	18.32
Telecom	1,125.95	-1.64	-2.05	0.76	0.76	-4.70	3.46 KWD	1.38	8.99
Industrials	1,016.13	-1.41	-1.91	1.30	1.30	-5.82	3.59 KWD	0.80	20.36
Financial services	1,283.65	-1.59	-2.04	4.62	4.62	2.10	3.73 KWD	0.78	18.84
Real estate	1,220.02	-0.81	-1.47	1.04	1.04	0.94	2.64 KWD	0.62	22.59
Basic materials	877.10	-1.78	-2.93	-3.34	-3.34	1.39	0.78 KWD	1.40	8.12
Health care	461.54	0.00	0.00	2.69	2.69	-0.07	0.23 KWD	0.99	6.96
Consumer services	625.11	1.22	1.64	1.63	1.63	30.24	0.82 KWD	0.88	14.09
Insurance	2,103.47	-0.03	-0.11	-0.31	-0.31	35.64	0.86 KWD	0.80	10.19
Consumer Disc	1,691.46	0.95	0.09	8.42	8.42	13.76	0.19 KWD	1.16	0.00
Energy	997.75	-2.03	-2.31	-2.12	-2.12	-12.36	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	526.32	-0.99	0.00	0.00	0.00	6.38	0.22 KWD	2.01	16.38

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged higher on Tuesday, extending gains from the previous session, as signs of tighter supplies and pledges by Chinese authorities to shore up the world's second-biggest economy lifted sentiment. Brent futures gained 7 cents at \$82.81 a barrel.

Kuwait Market

The market closed down by -1.06% at 7,248.47 value traded 41.2 million KD, Premier market value traded reached 33.5 million KD down -1.10% at 8,068.40

KSA Market

The market closed up today by 0.35% at 11,801.90

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



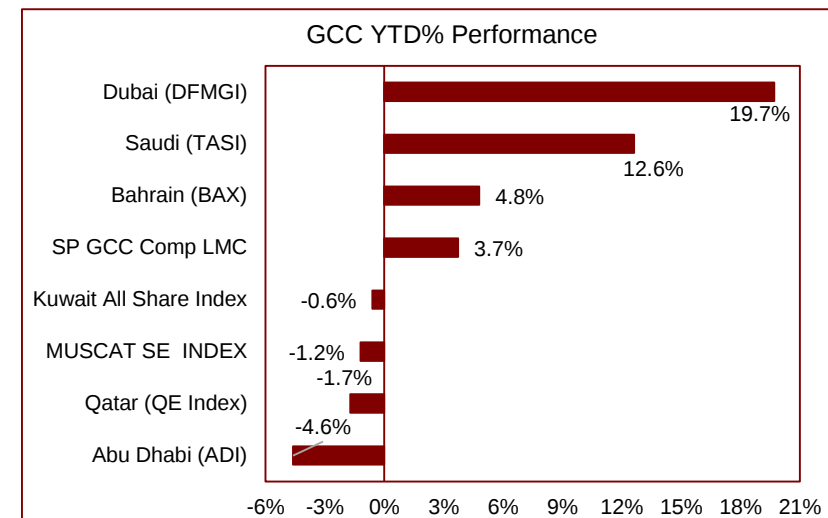
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.967	-1.33	-1.53	3.42	3.42	-5.81	7.68 KWD	1.86	27.00
KFH	0.783	-0.63	0.00	5.10	5.10	4.65	11.58 KWD	1.99	32.00
Zain	0.521	-1.70	-2.07	0.58	0.58	-7.46	2.26 KWD	1.76	11.11
BOUBYAN BANK	0.640	-1.54	-1.69	0.00	0.00	-14.99	2.54 KWD	2.63	34.00
Agility	0.640	-1.84	-2.44	2.73	2.73	-11.11	1.71 KWD	0.90	23.07
Saudi Arabia									
ARAMCO	32.25	-0.31	-0.15	0.00	0.00	10.51	7,804.50 SAR	5.23	13.93
SABIC	85.20	-0.23	-1.05	-3.40	-3.40	-4.70	255.60 SAR	1.37	35.00
STC	45.80	0.88	0.44	5.29	5.29	25.14	229.00 SAR	3.06	18.52
AL-RAJHI BANK	73.90	3.65	4.53	1.23	1.23	-1.73	295.60 SAR	2.98	16.95
NCB	40.30	-0.74	0.00	9.51	9.51	6.93	241.80 SAR	1.40	13.10
United Arab Emirates									
ETISALAT.AD	22.36	0.45	-0.71	-0.18	-0.18	-2.19	206.60 AED	5.10	21.10
FAB.AD	14.30	5.77	4.08	4.84	4.84	-16.37	158.00 AED	1.36	12.12
EMIRATES NBD	16.20	-0.92	-1.22	9.09	9.09	24.62	102.34 AED	1.07	6.12
DB ISLAMIC BK	5.70	0.88	0.71	4.20	4.20	0.00	41.28 AED	1.02	7.93
EMAAR PROPERT	6.70	0.60	-1.03	4.52	4.52	14.33	59.23 AED	0.83	7.06
Qatar									
QNB	15.96	-0.50	1.72	3.50	3.50	-11.33	147.36 QAR	1.43	10.69
INDUSTRIES QAT	12.23	0.49	2.34	8.90	8.90	-4.53	73.97 QAR	2.03	10.17
QA ISLAMIC BK	19.36	0.00	5.22	9.32	9.32	4.31	45.73 QAR	1.66	11.56
MASRAF AL RAYA	2.49	0.12	0.61	-2.97	-2.97	-21.57	23.12 QAR	0.97	22.30
MESAIEED PETRO	1.92	0.31	-0.16	1.00	1.00	-9.78	24.10 QAR	1.48	15.13
OMAN									
BANK MUSCAT	0.280	0.36	-0.71	1.45	1.45	1.82	2.11 OMR	0.97	8.33
OMANTEL	1.000	12.61	0.00	0.81	0.81	8.70	0.75 OMR	1.23	7.69
BANK DHOFAR	0.175	0.00	0.00	1.16	1.16	0.00	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.299	0.00	-0.33	6.79	6.79	3.46	0.49 QAR	0.75	12.71
OMINVEST	0.380	0.00	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 down today by -1.06 %The leading sector bottom performance indices today are Energy -2.03 % Basic materials -1.78 % Telecom -1.64 % respectively

KSA

Saudi Armco have negative performance today by -0.31 %, SABIC have negative performance today by -0.23 %. STC has a positive performance today by + 0.88 %, Al Rajhi Bank has a positive performance today by + 3.65 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.45 %, FAB.AD has a positive performance today by + 5.77 %



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