

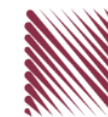


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 24th 2023





Sunday, September 24, 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)	10,291.62	-0.30	-0.30	0.95	2.15	-3.65	1.24	12.38	4.78	524.80
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)	1,931.83	0.12	0.12	-1.04	-1.33	1.93	0.76	9.35	6.01	7.02
Muscat SE INDEX	4,679.02	0.05	0.05	-2.50	-1.87	-3.67	0.84	10.14	4.71	6.54
SP GCC Comp LMC	173.68	-0.19	-0.19	-2.96	-2.98	-2.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.70	0.00	0.00	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	10.82	3.84	2,047.24
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	6,844.56	-1.32	-1.32	-2.30	-2.63	-6.14	1.46	15.51	3.27	45.05
Kuwait Premier Index	7,464.34	-1.56	-1.56	-3.00	-4.42	-8.03	1.62	17.10	3.11	35.97
Kuwait Main Index	5,711.46	-0.47	-0.47	0.33	4.54	2.05	1.04	11.03	3.91	9.08
Kuwait Sector										
Banking	1,667.80	-1.30	-1.30	-1.79	-2.23	-7.03	1.71	17.69	2.72	28.67
Telecom	1,068.65	-1.28	-1.28	-3.25	-4.36	-9.55	1.64	10.07	6.52	3.32
Industrials	902.37	-2.32	-2.32	-4.07	-10.04	-16.36	1.03	15.98	3.03	3.25
Financial Services	1,236.80	-1.24	-1.24	-2.60	0.80	-1.63	0.99	14.45	3.95	3.98
Real Estate	1,179.65	-1.54	-1.54	-2.91	-2.31	-2.40	0.93	14.67	2.10	2.57
Basic Materials	826.61	-1.11	-1.11	-6.12	-8.90	-4.45	1.46	9.33	9.35	0.47
Health Care	475.11	-0.06	-0.06	-1.58	5.71	2.87	1.72	12.22	1.75	0.24
Consumer Staples	609.01	-0.34	-0.34	0.06	-0.99	26.89	1.40	76.99	2.02	0.19
Insurance	2,216.51	-0.84	-0.84	-1.58	5.05	42.93	1.25	7.44	4.18	0.90
Consumer Discretionary	1,560.86	0.40	0.40	-2.45	0.05	4.98				
Energy	963.33	-1.40	-1.40	-3.24	-5.50	-15.39	0.77	9.82	5.20	0.20
Technology	534.71	0.00	0.00	-8.13	-20.88	-23.20	0.66			0.01
Utilities	494.74	-2.08	-2.08	-3.09	-6.00	0.00				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

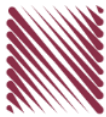
Oil prices held steady on Friday but closed the week lower on profit-taking and as markets weighed supply concerns stemming from Russia's fuel export ban against demand woes from future rate hikes. Brent futures settled 3 cents lower at \$93.27 a barrel.

Kuwait Market

The market closed down by – 1.32% at 6,844.56 value traded 72.6 million KD, Premier market value reached 49.4 million KD down by – 1.56% at 7,464.34

KSA Market

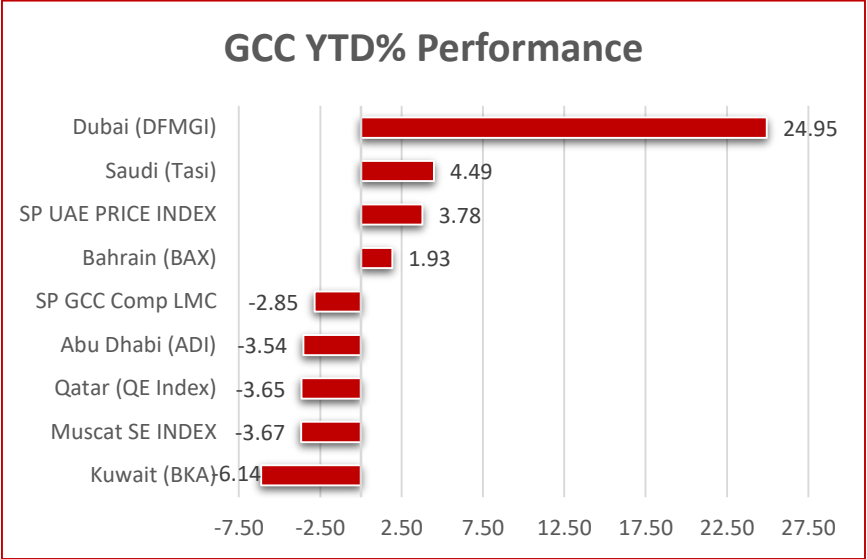
The market closed down today by – 1.01% at 10,949.42



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.908	-0.66	-0.66	-1.30	-2.89	-11.56	1.75	13.72	3.72	7.19
KFH	0.725	-1.76	-1.76	-2.68	-2.68	-3.10	1.85	18.88	2.32	10.72
ZAIN	0.491	-1.01	-1.01	-3.73	-5.21	-12.79	1.72	10.11	7.13	2.11
BOUBYAN BANK	0.591	-2.31	-2.31	-3.11	-7.66	-21.50	2.43	39.11	0.96	2.34
AGILITY	0.530	-3.64	-3.64	-7.83	-14.93	-26.39	0.71	19.67	0.00	1.42
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	20.60	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	18.15	0.28	4.61	11.01	22.22	39.62	1.17	5.89	3.31	114.65
DB ISLAMIC DB	5.90	1.72	3.87	4.61	7.86	3.51	1.02	7.85	5.08	42.87
EMAR.DU	7.74	-2.89	9.79	9.63	20.75	32.08	0.96	8.66	3.23	68.85
Qatar										
QNB	15.140	-0.66	-0.66	-2.95	-1.82	-15.89	1.36	10.14	3.96	139.85
INDUSTREIS QAT	14.300	1.06	1.06	15.70	27.34	11.63	2.31	16.57	7.69	86.52
QA ISLAMIC BK	18.610	-0.16	-0.16	-3.67	5.08	0.27	1.60	11.11	3.36	43.98
MASRAF AL RAYA	2.195	-0.63	-0.63	-1.13	-14.36	-30.78	0.85	19.68	4.56	20.41
MESAIEED PETRO	1.800	-0.55	-0.55	-2.17	-5.26	-15.37	1.36	17.21	6.11	22.61
Oman										
BANK MUSCAT	0.281	-1.06	-1.06	-1.40	1.81	2.18	0.94	11.06	5.34	2.10
OMANTEL	1.001	0.10	0.10	-2.82	0.91	8.80	1.20	32.37	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	0.00	3.04	8.93	5.54	0.76	11.16	2.43	0.49
OMINVEST	0.395	0.25	0.25	-0.75	4.50	-5.95	0.88	5.80	3.80	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 -1.32 %The leading sector bottom performance indices today are Industrials -2.32 %, Utilities -2.08 % Real Estate -1.54 % 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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