

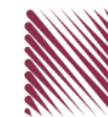


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, July 25th 2023



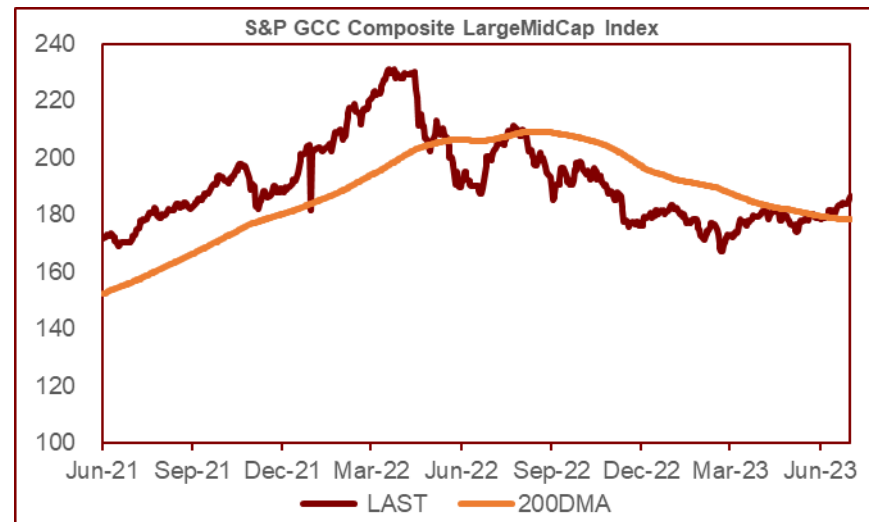


Market Watch

Tuesday, July 25, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,882.68	0.68	0.97	3.70	3.70	13.40	11,055 SAR	2.03	18.58
Qatar (QE Index)	10,535.95	0.37	2.23	4.58	4.58	-1.36	557 QAR	1.42	11.53
Dubai (DFMGI)	4,014.86	0.53	-0.18	5.88	5.88	20.35	579 AED	1.56	18.89
Abu Dhabi (ADI)	9,727.47	-0.13	0.31	1.85	1.85	-4.74	1,435 AED	1.83	21.91
Bahrain (BAX)	1,987.74	0.07	0.09	1.53	1.53	4.88	9 BHD	6.71	18.00
MUSCAT SE INDEX	4,782.69	-0.34	-0.56	0.30	0.30	-1.54	5 OMR	1.00	13.25
SP GCC Comp LMC	186.66	0.65	1.27	4.27	4.27	4.41			
SP UAE PRICE INDEX	140.21	0.17	0.56	4.37	4.37	1.97			
Developed Markets									
MSCI World Index	3,045.39	0.26	0.09	2.65	2.65	17.01			
U.S. (S&P 500)	4,567.46	0.28	0.27	2.63	2.63	18.96			
U.K. (FTSE 100)	7,691.80	0.17	3.19	2.13	2.13	3.22			
Japan (Topix)	2,285.38	0.18	1.47	-0.14	-0.14	20.81			
Emerging Markets									
MSCI EM Index	1,032.26	1.86	0.99	4.32	4.32	7.93			
China (SSE Composite)	3,231.52	2.13	1.05	0.92	0.92	4.61			
India (Sensex)	66,355.71	-0.04	-0.66	2.53	2.53	9.06			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,275.60	0.37	-0.61	3.50	3.50	-0.23	46.83 KWD	1.76	17.76
Kuwait Premier Index	8,104.07	0.44	-0.70	3.77	3.77	-0.14	36.63 KWD	1.70	17.38
Kuwait Main Index	5,593.39	0.10	-0.23	2.38	2.38	-0.06	10.20 KWD	1.97	19.16
NIC 50	9,294.93	1.96	-0.71	3.76	3.76	2.32	28.60 KWD	1.68	16.38
Kuwait Sector									
Banking	1,776.20	0.35	-0.21	4.13	4.13	-0.99	29.75 KWD	1.25	18.38
Telecom	1,124.87	-0.10	-2.14	0.67	0.67	-4.79	3.45 KWD	1.39	9.05
Industrials	1,018.94	0.28	-1.64	1.58	1.58	-5.56	3.59 KWD	0.81	20.48
Financial services	1,292.44	0.68	-1.37	5.34	5.34	2.80	3.73 KWD	0.76	18.93
Real estate	1,226.32	0.52	-0.96	1.56	1.56	1.46	2.65 KWD	0.62	22.74
Basic materials	884.33	0.82	-2.13	-2.54	-2.54	2.22	0.78 KWD	1.41	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	617.54	-1.21	0.41	0.40	0.40	28.67	0.83 KWD	0.88	14.08
Insurance	2,117.33	0.66	0.55	0.35	0.35	36.53	0.87 KWD	0.81	10.19
Consumer Disc	1,714.78	1.38	1.47	9.92	9.92	15.33	0.19 KWD	1.13	0.00
Energy	1,000.97	0.32	-1.99	-1.81	-1.81	-12.08	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	0.00	0.00	0.00	0.00	6.38	0.22 KWD	2.01	16.38



What Move the GCC markets

Oil Prices

Oil prices eased on Wednesday, sliding from three-month highs hit the previous day after industry data showed an expected rise in U.S. crude stockpiles, but losses were capped amid signs of tighter global supply and hopes for China's economic stimulus. Brent crude futures slid 32 cents, or 0.4%, to \$83.32.

Kuwait Market

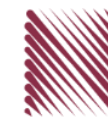
The market closed up by 0.37% at 7,275.60 value traded 34.4 million KD, Premier market value traded reached 29.6 million KD up 0.44% at 8,104.07

KSA Market

The market closed up today by 0.68% at 11,882.68

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	0.971	0.41	-1.12	3.85	3.85	-5.42	7.70 KWD	1.87	27.00
KFH	0.788	0.64	0.64	5.77	5.77	5.32	11.63 KWD	2.01	32.00
Zain	0.520	-0.19	-2.26	0.39	0.39	-7.64	2.25 KWD	1.75	11.09
BOUBYAN BANK	0.637	-0.47	-2.15	-0.47	-0.47	-15.39	2.52 KWD	2.61	34.00
Agility	0.643	0.47	-1.98	3.21	3.21	-10.69	1.72 KWD	0.90	23.18
Saudi Arabia									
ARAMCO	32.35	0.31	0.15	0.31	0.31	10.86	7,826.61 SAR	5.25	13.88
SABIC	86.00	0.94	-0.12	-2.49	-2.49	-3.80	257.93 SAR	1.38	35.00
STC	45.65	-0.33	0.11	4.94	4.94	24.73	228.19 SAR	3.05	18.68
AL-RAJHI BANK	75.00	1.49	6.08	2.74	2.74	-0.27	299.92 SAR	3.02	17.57
NCB	40.00	-0.74	-0.74	8.70	8.70	6.13	239.94 SAR	1.39	12.76
United Arab Emirates									
ETISALAT.AD	22.46	0.45	-0.27	0.27	0.27	-1.75	206.60 AED	5.10	21.10
FAB.AD	14.28	-0.14	3.93	4.69	4.69	-16.49	157.76 AED	1.36	12.10
EMIRATES NBD	16.25	0.31	-0.91	9.43	9.43	25.00	102.64 AED	1.07	6.14
DB ISLAMIC BK	5.80	1.75	2.47	6.03	6.03	1.75	42.00 AED	1.04	8.07
EMAAR PROPERT	6.70	0.00	-1.03	4.52	4.52	14.33	59.22 AED	0.83	7.06
Qatar									
QNB	16.00	0.25	1.98	3.76	3.76	-11.11	147.76 QAR	1.44	10.72
INDUSTRIES QAT	12.34	0.90	3.26	9.88	9.88	-3.67	74.65 QAR	2.04	10.26
QA ISLAMIC BK	19.31	-0.26	4.95	9.03	9.03	4.04	45.62 QAR	1.66	11.53
MASRAF AL RAYA	2.51	0.97	1.58	-2.03	-2.03	-20.81	23.35 QAR	0.98	22.52
MESAEED PETRO	1.94	1.04	0.88	2.05	2.05	-8.84	24.36 QAR	1.49	15.29
OMAN									
BANK MUSCAT	0.280	0.00	-0.71	1.45	1.45	1.82	2.10 OMR	0.94	8.33
OMANTEL	0.999	12.50	-0.10	0.71	0.71	8.59	0.75 OMR	1.23	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	0.295	-1.34	-1.67	5.36	5.36	2.08	0.48 QAR	0.74	12.71
OMINVEST	0.380	0.00	0.26	0.53	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding

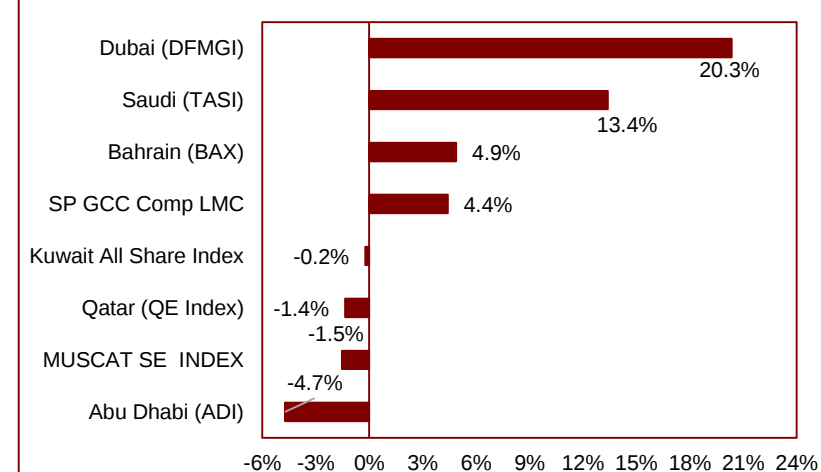
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%
19-July 23	24.32%	15.18%	0.06%	1.72%	0.24%	5.09%	17.58%	13.77%	6.17%	4.57%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.37 %. The leading sector best performance indices today are Consumer Disc 1.38 % Basic materials 0.82 % Financial services 0.68 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.31 %, SABIC have positive performance today by + 0.93%. STC have negative performance today by -0.33 %, Al Rajhi Bank has a positive performance today by + 1.49 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.45 %, FAB.AD have negative performance today by -0.14 %



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