

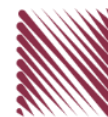


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, September 25th 2023





Monday, September 25, 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)	10,877.94	-0.65	-0.65	-5.34	-5.07	3.81	1.98	17.65	3.54	11,110.92
Qatar (QE Index)	10,267.78	-0.23	-0.53	0.72	1.92	-3.87	1.23	12.35	4.79	524.58
Dubai (DFMGI)	4,182.06	0.32	0.32	2.43	10.29	25.36	1.53	10.28	4.24	602.75
Abu Dhabi (ADI)	9,836.69	-0.13	-0.13	0.27	3.00	-3.67	2.54	15.82	2.22	2,780.05
Bahrain (BAX)	1,935.05	0.17	0.29	-0.88	-1.17	2.10	0.77	9.36	6.00	7.04
Muscat SE INDEX	4,664.68	-0.31	-0.26	-2.80	-2.17	-3.97	0.84	10.13	4.71	6.53
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	2,879.79	0.00	0.00	-3.56	-2.93	10.65				
U.S. (S&P 500)	4,337.44	0.40	0.40	-3.78	-2.54	12.97	3.85	22.08	2.10	38,293.13
U.K. (FTSE 100)	7,623.99	-0.78	-0.78	2.48	1.23	2.31	1.59	10.75	3.87	2,030.73
Japan (topix)	2,385.50	0.39	0.39	2.29	4.23	26.10	1.39	14.19	2.15	861,736.27
Emerging Markets										
MSCI EM Index	957.41	-0.71	-0.71	-2.34	-3.24	0.11				
China (SSE Composite)	3,115.61	-0.54	-0.54	-0.14	-2.70	0.85	1.36	12.00		44,025.04
India (Sensex)	66,023.69	0.02	0.02	1.84	2.02	8.52	4.26	22.69	1.22	129,180.02

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,865.94	0.31	-1.02	-2.00	-2.33	-5.84	1.44	15.32	3.31	44.50
Kuwait Premier Index	7,491.02	0.36	-1.20	-2.65	-4.08	-7.70	1.60	16.86	3.16	35.46
Kuwait Main Index	5,719.88	0.15	-0.32	0.48	4.69	2.20	1.04	10.99	3.92	9.04
Kuwait Sector										
Banking	1,677.66	0.59	-0.72	-1.21	-1.65	-6.48	1.69	17.49	2.75	28.34
Telecom	1,074.53	0.55	-0.73	-2.72	-3.84	-9.05	1.62	9.95	6.61	3.28
Industrials	898.13	-0.47	-2.77	-4.52	-10.46	-16.75	1.00	15.59	3.11	3.17
Financial Services	1,235.48	-0.11	-1.35	-2.71	0.69	-1.73	0.98	14.31	4.00	3.93
Real Estate	1,174.18	-0.46	-1.99	-3.36	-2.76	-2.86	0.92	14.45	2.13	2.53
Basic Materials	823.40	-0.39	-1.49	-6.48	-9.26	-4.82	1.44	9.22	9.46	0.47
Health Care	475.11	0.00	-0.06	-1.58	5.71	2.87	1.72	12.21	1.75	0.24
Consumer Staples	593.60	-2.53	-2.86	-2.47	-3.49	23.68	1.40	76.70	2.02	0.19
Insurance	2,229.93	0.61	-0.24	-0.98	5.68	43.79	1.24	7.38	4.21	0.89
Consumer Discretionary	1,552.71	-0.52	-0.13	-2.96	-0.47	4.43				
Energy	958.80	-0.47	-1.86	-3.69	-5.94	-15.79	0.76	9.69	5.27	0.20
Technology	538.35	0.68	0.68	-7.50	-20.34	-22.68	0.66			0.01
Utilities	494.74	0.00	-2.08	-3.09	-6.00	0.00				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

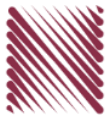
Oil prices rose on Monday as investors focused on a tighter supply outlook after Moscow issued a temporary ban on fuel exports while remaining wary of further rate hikes that could dampen demand. Brent crude futures climbed 17 cents, or 0.2%, to \$93.44 a barrel.

Kuwait Market

The market closed up by + 0.31% at 6,865.94 value traded 54.4 million KD, Premier market value reached 36.0 million KD up by + 0.36% at 7,491.02

KSA Market

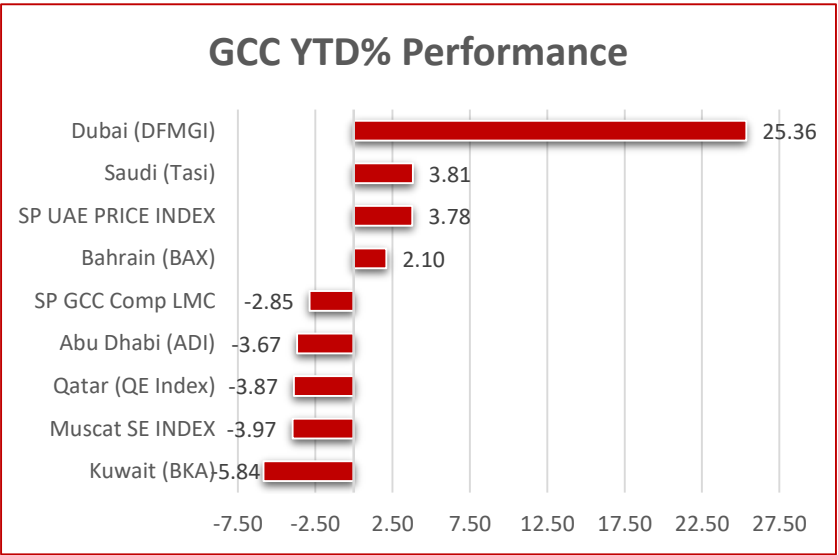
The market closed down today by – 0.65% at 10,877.94



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.906	-0.22	-0.88	-1.52	-3.10	-11.75	1.74	13.69	3.73	7.19
KFH	0.732	0.97	-0.81	-1.74	-1.74	-2.16	1.87	19.06	2.30	10.82
ZAIN	0.490	-0.20	-1.21	-3.92	-5.41	-12.97	1.71	10.09	7.14	2.12
BOUBYAN BANK	0.600	1.52	-0.83	-1.64	-6.25	-20.30	2.46	39.71	0.94	2.38
AGILITY	0.527	-0.57	-4.18	-8.35	-15.41	-26.81	0.71	19.56	0.00	1.41
Saudi Arabia										
ARAMCO	33.95	-0.44	-0.44	-2.72	5.27	16.34	5.37	16.17	3.98	8,215.68
SABIC	83.10	0.12	0.12	-6.00	-5.78	-7.05	1.41	62.89	4.57	249.29
STC	37.65	-0.92	-0.92	-5.40	-13.45	2.87	2.49	15.16	4.25	188.24
AL-RAJHI BANK	66.70	-1.91	-1.91	-7.62	-8.63	-11.30	2.59	15.64	2.66	266.79
NCB	32.80	-0.91	-0.91	-8.25	-10.87	-12.97	1.15	10.36	3.96	196.79
Abu Dhabi										
ETISALAT.AD	20.50	-0.49	-0.49	3.33	-8.48	-10.32	4.27	18.10	3.90	178.28
FAB.AD	13.56	0.00	0.00	-0.88	-0.59	-20.70	1.29	11.49	3.83	149.81
EMIRATES NBD	18.40	1.38	1.38	12.54	23.91	41.54	1.18	5.98	3.26	116.23
DB ISLAMIC DB	5.89	-0.17	-0.17	4.43	7.68	3.33	1.02	7.84	5.09	42.65
EMAR.DU	7.90	2.07	2.07	11.90	23.24	34.81	0.98	8.84	3.16	69.83
Qatar										
QNB	15.300	1.06	0.39	-1.92	-0.78	-15.00	1.37	10.25	3.92	141.32
INDUSTREIS QAT	14.090	-1.47	-0.42	14.00	25.47	9.99	2.28	16.33	7.81	85.25
QA ISLAMIC BK	18.500	-0.59	-0.75	-4.24	4.46	-0.32	1.59	11.05	3.38	43.72
MASRAF AL RAYA	2.186	-0.41	-1.04	-1.53	-14.71	-31.06	0.85	19.60	4.57	20.33
MESAIEED PETRO	1.808	0.44	-0.11	-1.74	-4.84	-15.00	1.37	17.29	6.08	22.71
Oman										
BANK MUSCAT	0.281	0.00	-1.06	-1.40	1.81	2.18	0.94	11.06	5.34	2.11
OMANTEL	0.999	0.10	0.10	-2.82	0.91	8.80	1.19	32.31	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	0.50
OMINVEST	0.394	-0.25	0.00	-1.01	4.23	-6.19	0.88	5.79	3.81	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 up today by + 0.31 %The leading sector top performance indices today are Technology + 0.68 %, Insurance + 0.61 % Banking +0.59 % respectively

KSA
Saudi Armco has a negative performance today by –0.44%, SABIC has a positive performance today by + 0.12 %, STC has a negative performance today by – 0.92 %, Al Rajhi Bank has a negative performance today by –1.91%

U.A.E
ETISALAT .AD has a negative performance today by - 0.49 %, FAB.AD has a flat performance today.



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