



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, August 27th 2023

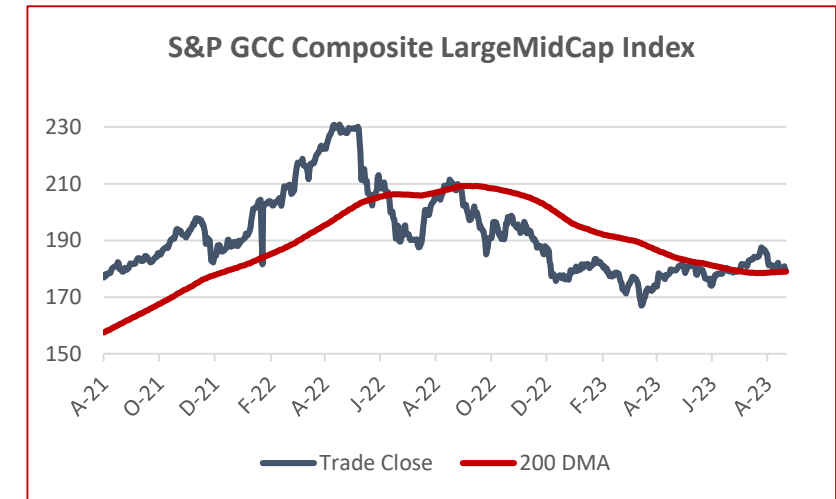




Sunday, August 27, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,405.30	0.57	0.57	-1.90	0.10	9.46	2.09	18.67	3.33	11,492.63
Qatar (QE Index)	10,364.71	0.21	0.21	-5.26	3.10	-2.76	1.25	12.49	4.73	531.78
Dubai (DFMGI)	4,099.49	-0.18	1.21	0.99	8.11	22.88	1.49	9.98	4.37	582.76
Abu Dhabi (ADI)	9,765.37	-0.06	-0.36	-0.22	2.25	-4.37	2.46	15.45	2.24	2,730.57
Bahrain (BAX)	1,952.33	0.05	0.05	-1.57	-0.23	3.06	0.77	9.41	5.97	7.11
Muscat SE INDEX	4,775.96	-0.08	-0.08	-0.08	0.08	-1.76	0.87	10.39	4.69	6.66
SP GCC Comp LMC	179.20	0.33	0.33	-3.04	0.44	0.57	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.93	0.00	0.00	-0.99	4.15	1.77				
Developed Markets										
MSCI World Index	2,911.99	0.20	0.50	-4.97	-1.84	11.88				
U.S. (S&P 500)	4,405.71	0.67	0.82	-3.99	-1.00	14.75	3.92	22.44	2.04	38,824.18
U.K. (FTSE 100)	7,338.58	0.07	1.05	-4.69	-2.56	-1.52	1.54	10.30	4.02	1,981.98
Japan (topix)	2,266.40	-0.88	1.30	-2.42	-0.97	19.81	1.32	13.50	2.26	819,383.79
Emerging Markets										
MSCI EM Index	971.04	-1.15	0.68	-7.25	-1.86	1.53				
China (SSE Composite)	3,064.07	-0.59	-2.17	-6.90	-4.31	-0.82	1.36	12.00		44,025.04
India (Sensex)	64,886.51	-0.56	-0.10	-2.47	0.26	6.65	4.11	22.64	1.24	127,789.95

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,051.85	-0.12	-0.12	-2.90	0.19	-3.41	1.48	15.93	3.22	45.74
Kuwait Premier Index	7,765.55	-0.13	-0.13	-3.79	-0.69	-4.44	1.65	17.60	3.04	36.76
Kuwait Main Index	5,674.53	-0.09	-0.09	0.70	3.76	1.29	1.04	11.18	3.96	8.97
Kuwait Sector										
Banking	1,712.34	-0.18	-0.18	-3.38	0.20	-4.72	1.74	17.92	2.69	29.00
Telecom	1,107.48	-0.04	-0.04	-0.58	-0.93	-6.30	1.68	10.54	6.38	3.40
Industrials	960.60	-0.15	-0.15	-4.21	-4.37	-11.09	1.08	16.96	2.92	3.38
Financial Services	1,261.30	-0.40	-0.40	-2.64	2.38	-0.08	1.00	15.47	3.88	4.01
Real Estate	1,223.58	0.46	0.46	-1.67	1.80	1.70	0.95	15.50	2.06	2.63
Basic Materials	870.31	1.06	1.06	-0.40	-3.07	1.67	1.52	9.71	8.98	0.49
Health Care	482.72	0.00	0.00	6.26	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	605.23	-0.29	-0.29	-2.92	-1.89	25.74	1.39	76.25	2.04	0.18
Insurance	2,213.91	0.09	0.09	1.69	5.02	42.88	1.25	7.40	4.22	0.89
Consumer Discretionary	1,625.56	0.11	0.11	-5.43	4.32	9.45				
Energy	1,002.91	-0.09	-0.09	0.31	-1.70	-11.99	0.79	10.17	5.06	0.21
Technology	563.81	0.00	0.00	-2.27	-16.58	-19.02	0.70			0.01
Utilities	510.53	0.00	0.00	-3.96	-3.00	3.19				



What Move the GCC markets

Oil Prices

Oil futures climbed about 1% to a one-week high on Friday as U.S. diesel prices soared, the number of oil rigs dropped and a fire broke out at a refinery in Louisiana. Brent crude futures rose \$1.12, or 1.3%, to settle at \$84.48 a barrel

Kuwait Market

The market closed down by - 0.12% at 7,051.85 value traded 19.2 million KD, Premier market value reached 14.0 million KD down - 0.13% at 7,765.55

KSA Market

The market closed up today by + 0.57% at 11,405.30



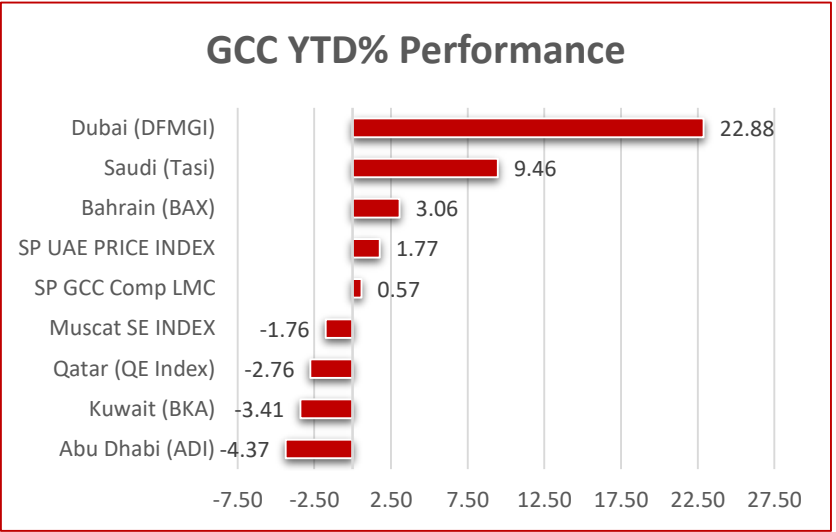
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.925	-0.64	-0.64	-3.85	-1.07	-9.90	13.98	1.78	3.66	7.32
KFH	0.750	-0.13	-0.13	-4.94	0.67	0.24	19.53	1.92	2.24	11.06
ZAIN	0.516	0.00	0.00	-0.96	-0.39	-8.35	10.63	1.80	6.78	2.23
BOUBYAN BANK	0.617	0.49	0.49	-0.48	-3.59	-18.04	40.83	2.53	0.92	2.44
AGILITY	0.598	-0.33	-0.33	-5.08	-4.01	-16.94	22.20	0.81	0.00	1.60
Saudi Arabia										
ARAMCO	34.80	0.43	0.43	7.41	7.91	19.25	16.58	5.51	3.88	8,422.50
SABIC	88.40	0.68	0.68	3.15	0.23	-1.12	66.90	1.50	4.30	265.23
STC	40.25	0.88	0.88	-5.07	-7.47	9.97	16.21	2.66	3.98	201.27
AL-RAJHI BANK	72.50	0.28	0.28	-2.82	-0.68	-3.59	17.00	2.81	2.45	290.03
NCB	35.90	0.84	0.84	-6.87	-2.45	-4.75	11.34	1.26	3.62	215.42
Abu Dhabi										
ETISALAT.AD	20.00	-0.89	-6.10	-10.71	-10.71	-12.51	17.66	4.17	4.00	173.94
FAB.AD	13.90	0.00	-0.29	-5.05	1.91	-18.71	11.78	1.32	3.74	153.56
EMIRATES NBD	17.25	-0.29	2.07	1.47	16.16	32.69	5.60	1.11	3.48	108.96
DB ISLAMIC DB	5.68	0.18	0.53	-1.22	3.84	-0.35	7.56	0.98	5.28	41.13
EMAR.DU	6.90	-1.43	1.77	2.07	7.64	17.75	7.72	0.86	3.62	60.99
Qatar										
QNB	16.000	0.19	0.19	-5.77	3.76	-11.11	10.72	1.44	3.75	147.86
INDUSTREIS QAT	12.500	-1.57	-1.57	-6.23	11.31	-2.42	14.48	2.02	8.80	75.66
QA ISLAMIC BK	19.770	0.41	0.41	-6.52	11.63	6.52	11.80	1.70	3.16	46.74
MASRAF AL RAYA	2.288	0.26	0.26	-8.84	-10.73	-27.85	20.52	0.89	4.37	21.29
MESAIEED PETRO	1.890	0.53	0.53	-3.08	-0.53	-11.14	18.07	1.43	5.82	23.76
Oman										
BANK MUSCAT	0.284	0.00	0.00	1.43	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.020	0.00	0.00	2.51	2.82	10.87	32.99	1.22	3.19	0.76
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	20.09	0.73	2.86	0.52
NAT BANK OF OMAN	0.294	-1.34	-1.34	1.73	5.00	1.73	10.75	0.73	2.52	0.48
OMINVEST	0.392	0.51	0.51	0.77	3.70	-6.67	5.76	0.87	3.83	0.26

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-August 23	24.40%	15.02%	0.07%	2.19%	0.24%	5.10%	17.55%	13.62%	6.15%	4.63%
23-August 23	24.37%	15.00%	0.07%	2.21%	0.23%	5.13%	17.55%	13.60%	6.12%	4.67%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by - 0.12%. The leading sector top performance indices today are Basic Materials + 1.06 % , Real Estate + 0.46 % , Consumer Discretionary + 0.11 % respectively

KSA

Saudi Armco has a positive performance today by + 0.43 % , SABIC has a positive performance today by + 0.68 % , STC has a positive performance today by + 0.88% , Al Rajhi Bank has a negative performance today by + 0.28%

U.A.E

ETISALAT .AD has a negative performance today by – 0.89 % , FAB.AD has a flat performance today



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