

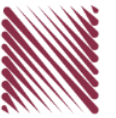


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, July 27th 2023



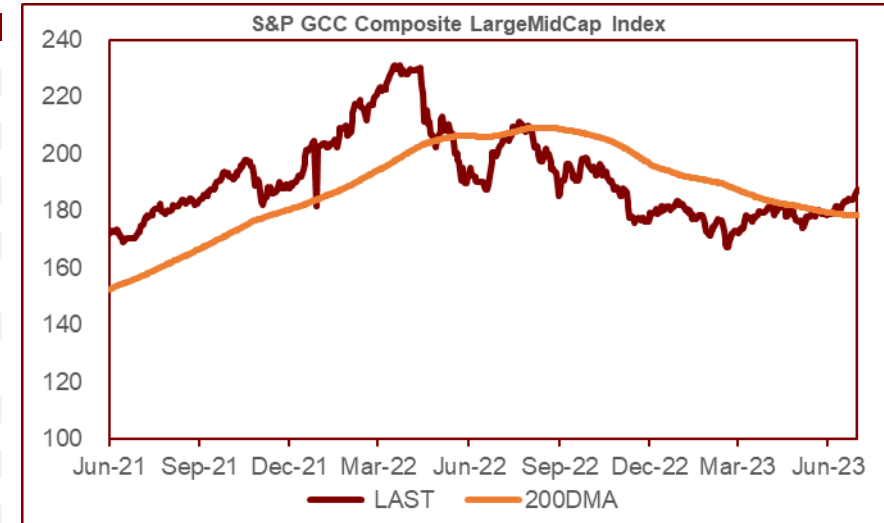


Market Watch

Thursday, July 27, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,847.72	-0.49	0.67	3.39	3.39	13.07	11,039 SAR	2.05	19.05
Qatar (QE Index)	10,894.59	1.20	5.71	8.14	8.14	2.00	575 QAR	1.47	12.04
Dubai (DFMGI)	4,036.88	-0.25	0.18	6.26	6.26	20.78	579 AED	1.59	19.76
Abu Dhabi (ADI)	9,760.83	-0.06	0.64	2.19	2.19	-4.42	1,435 AED	1.87	22.03
Bahrain (BAX)	1,992.41	0.39	0.33	1.76	1.76	4.7	9 BHD	6.29	18.00
MUSCAT SE INDEX	4,780.02	0.26	-0.62	0.25	0.25	-1.59	5 OMR	0.99	13.25
SP GCC Comp LMC	187.01	-0.24	1.48	4.49	4.49	4.63			
SP UAE PRICE INDEX	140.21	-0.12	0.66	4.47	4.47	2.08			
Developed Markets									
MSCI World Index	3,057.84	-0.34	-0.27	2.28	2.28	16.59			
U.S. (S&P 500)	4,582.23	-0.64	-0.39	1.96	1.96	18.18			
U.K. (FTSE 100)	7,694.27	0.21	3.21	2.14	2.14	3.23			
Japan (Topix)	2,290.61	0.53	1.90	0.29	0.29	21.33			
Emerging Markets									
MSCI EM Index	1,043.20	0.32	1.27	4.62	4.62	8.24			
China (SSE Composite)	3,275.93	-0.20	0.59	0.46	0.46	4.12			
India (Sensex)	66,160.20	-0.66	-0.79	2.39	2.39	8.92			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,263.44	-0.20	-0.77	3.32	3.32	-0.39	46.82 KWD	1.75	17.67
Kuwait Premier Index	8,086.73	-0.22	-0.91	3.55	3.55	-0.36	36.59 KWD	1.69	17.27
Kuwait Main Index	5,594.81	-0.12	-0.20	2.40	2.40	-0.04	10.22 KWD	1.95	19.14
NIC 50	9,294.93	1.96	-0.92	3.54	3.54	2.32	28.60 KWD	1.67	16.27
Kuwait Sector									
Banking	1,770.22	-0.32	-0.55	3.78	3.78	-1.32	29.69 KWD	1.23	18.27
Telecom	1,118.74	-1.74	-2.67	0.12	0.12	-5.31	3.43 KWD	1.37	8.97
Industrials	1,018.00	-0.19	-1.73	1.49	1.49	-5.64	3.59 KWD	0.80	20.47
Financial services	1,297.56	1.02	-0.98	5.75	5.75	3.21	3.75 KWD	0.76	18.75
Real estate	1,240.31	0.46	0.17	2.72	2.72	2.61	2.68 KWD	0.62	22.76
Basic materials	879.96	0.08	-2.61	-3.02	-3.02	1.72	0.78 KWD	1.40	8.12
Health care	454.28	-1.57	-1.57	1.08	1.08	-1.64	0.23 KWD	0.95	6.62
Consumer services	618.95	1.07	0.64	0.63	0.63	28.96	0.83 KWD	0.88	14.15
Insurance	2,131.03	0.72	1.20	1.00	1.00	37.41	0.87 KWD	0.82	10.19
Consumer Disc	1,704.32	0.46	0.85	9.25	9.25	14.63	0.19 KWD	1.15	0.00
Energy	1,000.72	1.59	-2.02	-1.83	-1.83	-12.10	0.21 KWD	0.71	4.53
Technology	602.37	3.24	-1.90	-10.87	-10.87	-13.48	0.01 KWD	0.75	0.00
Utilities	526.32	-0.50	0.00	0.00	0.00	6.38	0.22 KWD	2.01	16.38



What Move the GCC markets

Oil Prices

Bolstered by supply cuts from the OPEC+ alliance announced earlier this month, both oil benchmarks are on track for a 3.6% weekly increase - a fifth straight week of gains. By 1229 GMT, Brent crude slipped 9 cents to \$84.15 a barrel.

Kuwait Market

The market closed down by -0.2% at 7,263.44 value traded 53.9 million KD, Premier market value traded reached 43.4 million KD down -0.22% at 8,104.66

KSA Market

The market closed down today by -0.49% at 11,847.72

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



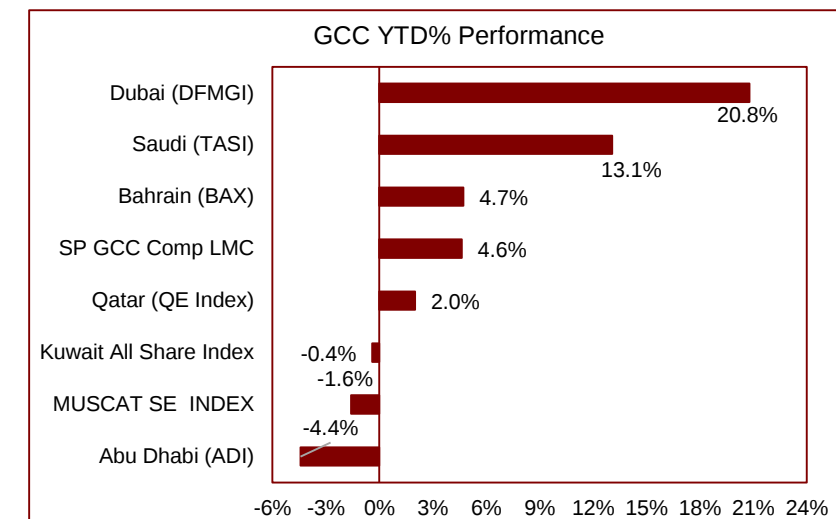
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.970	0.00	-1.22	3.74	3.74	-5.52	7.70 KWD	1.87	27.00
KFH	0.786	-0.13	0.38	5.50	5.50	5.05	11.61 KWD	2.01	32.00
Zain	0.521	-1.70	-2.07	0.58	0.58	-7.46	2.26 KWD	1.76	11.11
BOUBYAN BANK	0.625	-2.50	-3.99	-2.34	-2.34	-16.98	2.48 KWD	2.56	34.00
Agility	0.644	0.31	-1.83	3.37	3.37	-10.56	1.72 KWD	0.90	23.22
Saudi Arabia									
ARAMCO	32.30	-0.31	0.00	0.16	0.16	10.69	7,817.85 SAR	5.24	13.95
SABIC	86.50	0.58	0.46	-1.93	-1.93	-3.24	259.54 SAR	1.39	35.00
STC	44.85	-0.44	-1.64	3.10	3.10	22.54	224.29 SAR	2.99	18.37
AL-RAJHI BANK	75.40	-0.92	6.65	3.29	3.29	0.27	301.65 SAR	3.04	18.09
NCB	39.90	0.00	-0.99	8.42	8.42	5.87	239.44 SAR	1.39	12.63
United Arab Emirates									
ETISALAT.AD	22.26	-0.54	-1.15	-0.62	-0.62	-2.62	206.60 AED	5.10	21.10
FAB.AD	14.64	0.83	6.55	7.33	7.33	-14.39	159.95 AED	1.37	12.41
EMIRATES NBD	16.65	1.83	1.52	12.12	12.12	28.08	104.84 AED	1.07	6.29
DB ISLAMIC BK	5.71	0.00	0.88	4.39	4.39	0.18	41.48 AED	0.99	7.60
EMAAR PROPERT	6.71	-0.15	-0.89	4.68	4.68	14.51	59.39 AED	0.83	7.07
Qatar									
QNB	16.80	3.07	7.07	8.95	8.95	-6.67	155.17 QAR	1.51	11.26
INDUSTRIES QAT	13.38	4.94	11.97	19.15	19.15	4.45	80.95 QAR	2.22	11.12
QA ISLAMIC BK	20.50	0.49	11.41	15.75	15.75	10.45	48.44 QAR	1.76	12.24
MASRAF AL RAYA	2.51	-1.45	1.50	-2.11	-2.11	-20.88	23.33 QAR	0.97	22.50
MESAIEED PETRO	1.95	0.52	1.46	2.63	2.63	-8.32	24.50 QAR	1.50	15.38
OMAN									
BANK MUSCAT	0.279	0.00	-1.06	1.09	1.09	1.45	2.09 OMR	0.94	8.33
OMANTEL	0.998	12.39	-0.20	0.60	0.60	8.48	0.75 OMR	1.23	7.69
BANK DHOFAR	0.174	0.00	-0.57	0.58	0.58	-0.57	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.290	0.00	-3.33	3.57	3.57	0.35	0.47 QAR	0.73	12.71
OMINVEST	0.383	0.79	1.06	1.32	1.32	-8.81	0.26 QAR	0.72	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-July 23	24.32%	15.18%	0.06%	1.72%	0.24%	5.09%	17.58%	13.77%	6.17%	4.57%
26-July 23	24.37%	15.18%	0.07%	1.78%	0.24%	5.10%	17.58%	13.78%	6.19%	4.59%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.2 %The leading sector bottom performance indices today are Telecom -1.74 % Health care -1.57 % Utilities -0.5 % respectively

KSA

Saudi Armco have negative performance today by -0.31 %, SABIC have positive performance today by + 0.58%. STC have negative performance today by -0.44 %, Al Rajhi Bank have negative performance today by -0.92 %

U.A.E

ETISALAT .AD have negative performance today by -0.54 %, FAB.AD has a positive performance today by + 0.83 %



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