



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, September 27th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,055.96	-0.19	0.97	-3.79	-3.52	5.51	1.98	18.98	3.14	11,408.44
Qatar (QE Index)	10,251.95	-0.12	-0.69	0.56	1.76	-4.02	1.24	10.55	4.76	544.62
Dubai (DFMGI)	4,163.58	0.23	-0.12	1.98	9.80	24.80	1.53	10.26	4.25	597.50
Abu Dhabi (ADI)	9,785.32	-0.29	-0.65	-0.25	2.46	-4.17	2.53	15.76	2.23	2,756.44
Bahrain (BAX)	1,939.13	0.07	0.50	-0.67	-0.96	2.31	0.77	9.38	5.99	7.05
Muscat SE INDEX	4,669.02	0.09	-0.17	-2.71	-2.08	-3.88	0.84	10.12	4.72	6.52
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	2,855.88	0.53	-0.83	-4.36	-3.74	9.73				
U.S. (S&P 500)	4,299.70	0.59	-0.47	-4.61	-3.39	11.99	3.82	21.91	2.12	38,016.81
U.K. (FTSE 100)	7,608.08	0.08	-0.99	2.27	1.02	2.10	1.58	10.72	3.88	2,026.26
Japan (topix)	2,323.39	-0.94	-2.23	-0.37	1.52	22.82	1.35	13.84	2.21	839,998.25
Emerging Markets										
MSCI EM Index	944.08	-0.44	-2.09	-3.70	-4.59	-1.29				
China (SSE Composite)	3,110.48	0.10	-0.70	-0.30	-2.86	0.69	1.36	12.00		44,025.04
India (Sensex)	65,828.41	0.49	-0.27	1.54	1.71	8.20	4.25	22.62	1.22	128,720.05

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,886.73	-0.12	-0.72	-1.70	-2.03	-5.56	1.45	15.41	3.29	44.74
Kuwait Premier Index	7,520.81	-0.12	-0.81	-2.27	-3.69	-7.33	1.61	16.97	3.13	35.71
Kuwait Main Index	5,717.38	-0.15	-0.37	0.44	4.64	2.15	1.04	11.03	3.93	9.03
Kuwait Sector										
Banking	1,680.34	-0.36	-0.56	-1.06	-1.49	-6.33	1.70	17.60	2.74	28.52
Telecom	1,072.29	0.12	-0.94	-2.92	-4.04	-9.24	1.62	9.98	6.59	3.29
Industrials	920.09	1.90	-0.40	-2.19	-8.27	-14.72	1.02	15.90	3.05	3.23
Financial Services	1,238.38	-0.77	-1.12	-2.48	0.93	-1.50	0.99	14.35	4.01	3.94
Real Estate	1,175.57	0.07	-1.88	-3.24	-2.65	-2.74	0.91	14.47	2.14	2.52
Basic Materials	833.08	-0.13	-0.33	-5.38	-8.19	-3.70	1.45	9.30	9.38	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	595.99	0.00	-2.47	-2.08	-3.11	24.18	1.37	74.93	2.07	0.18
Insurance	2,221.17	0.37	-0.63	-1.37	5.27	43.23	1.24	7.39	4.20	0.90
Consumer Discretionary	1,557.17	0.23	0.16	-2.68	-0.19	4.73				
Energy	961.26	-0.17	-1.61	-3.44	-5.70	-15.57	0.76	9.62	5.28	0.20
Technology	555.81	0.53	3.95	-4.50	-17.76	-20.17	0.69			0.01
Utilities	489.47	0.00	-3.13	-4.13	-7.00	-1.07				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose by more than \$1 a barrel on Wednesday as markets focused on supply tightness heading into winter and a “soft landing” for the U.S. economy. Brent crude futures were up \$1.24, or 1.3%, to \$95.20 a barrel.

Kuwait Market

The market closed down by - 0.12% at 6,886.73 value traded 43.4 million KD, Premier market value reached 28.0 million KD down by - 0.12% at 7,520.81

KSA Market

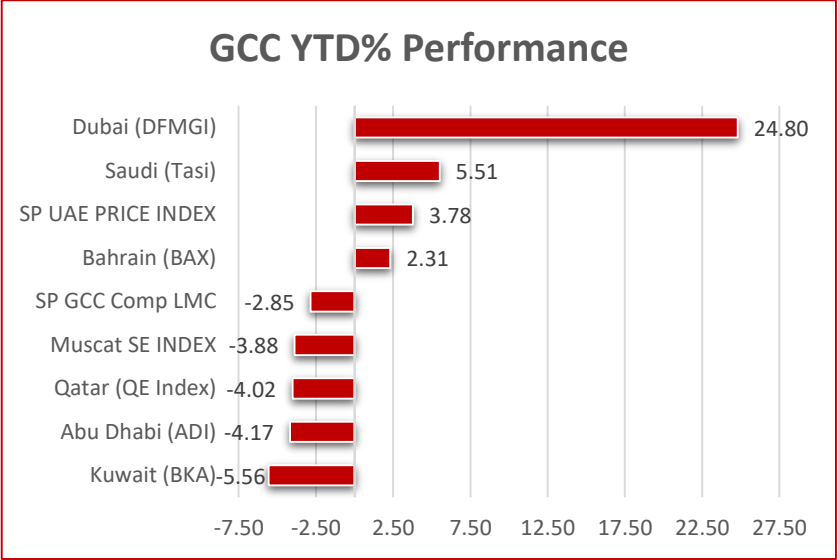
The market closed down today by - 0.19% at 11,055.96



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	-0.33	-0.88	-1.52	-3.10	-11.75	1.74	13.69	3.73	7.18
KFH	0.733	-0.54	-0.68	-1.61	-1.61	-2.03	1.87	19.09	2.29	10.82
ZAIN	0.487	0.21	-1.81	-4.51	-5.98	-13.50	1.70	10.03	7.19	2.11
BOUBYAN BANK	0.604	-0.17	-0.17	-0.98	-5.63	-19.77	2.48	39.97	0.94	2.39
AGILITY	0.558	5.08	1.45	-2.96	-10.43	-22.50	0.75	20.71	0.00	1.49
Saudi Arabia										
ARAMCO	35.00	0.43	2.64	0.29	8.53	19.94	5.54	16.67	3.86	8,470.00
SABIC	82.50	0.00	-0.60	-6.67	-6.46	-7.72	1.40	62.44	4.61	247.50
STC	37.60	-1.05	-1.05	-5.53	-13.56	2.73	2.48	15.14	4.26	188.00
AL-RAJHI BANK	67.90	-1.16	-0.15	-5.96	-6.99	-9.71	2.63	15.93	2.61	271.60
NCB	32.80	-0.30	-0.91	-8.25	-10.87	-12.97	1.15	10.36	3.96	196.80
Abu Dhabi										
ETISALAT.AD	20.44	-0.97	-0.78	3.02	-8.75	-10.59	4.26	18.04	3.91	177.76
FAB.AD	13.60	0.00	0.29	-0.58	-0.29	-20.47	1.29	11.52	3.82	150.25
EMIRATES NBD	17.80	-0.56	-1.93	8.87	19.87	36.92	1.14	5.78	3.37	112.44
DB ISLAMIC DB	5.85	1.21	-0.85	3.72	6.95	2.63	1.01	7.79	5.13	42.36
EMAR.DU	8.04	4.42	3.88	13.88	25.43	37.20	1.00	9.00	3.11	71.06
Qatar										
QNB	15.400	-1.47	1.05	-1.28	-0.13	-14.44	1.38	10.32	3.90	142.24
INDUSTREIS QAT	13.710	0.29	-3.11	10.92	22.08	7.03	2.22	15.89	8.02	82.95
QA ISLAMIC BK	18.560	0.00	-0.43	-3.93	4.80	0.00	1.59	11.08	3.37	43.86
MASRAF AL RAYA	2.229	0.86	0.91	0.41	-13.03	-29.71	0.87	19.99	4.49	20.73
MESAIEED PETRO	1.855	1.37	2.49	0.82	-2.37	-12.79	1.40	17.74	5.93	23.30
Oman										
BANK MUSCAT	0.278	-0.71	-2.11	-2.46	0.72	1.09	0.93	10.94	5.40	2.09
OMANTEL	0.990	-0.90	-1.00	-3.88	-0.20	7.61	1.18	32.02	3.28	0.74
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	0.309	2.32	1.31	4.39	10.36	6.92	0.77	11.30	2.39	0.50
OMINVEST	0.394	-0.51	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 down today by - 0.12 % The leading sector bottom performance indices today are Financial Services - 0.77 %, Banking - 0.36 % Energy - 0.17 % respectively

KSA
Saudi Armco has a positive performance today by + 0.43%, SABIC has a flat performance today, STC has a negative performance today by – 1.05 %, Al Rajhi Bank has a negative performance today by - 1.16%

U.A.E
ETISALAT .AD has a negative performance today by - 0.97 %, FAB.AD has a flat performance today



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