



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, August 28th 2023

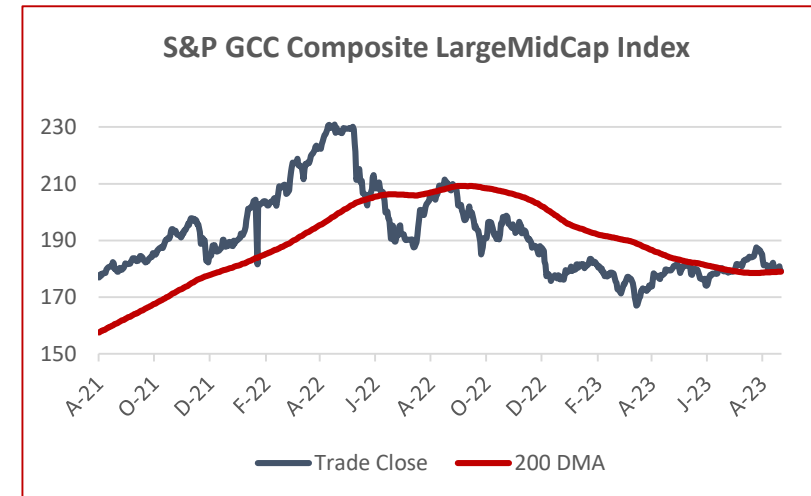




Monday, August 28, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,464.26	-0.05	0.52	-1.95	0.05	9.41	2.09	18.62	3.35	11,435.86
Qatar (QE Index)	10,336.17	-0.48	-0.28	-5.72	2.60	-3.23	1.24	12.43	4.76	528.46
Dubai (DFMGI)	4,099.52	0.00	0.00	0.99	8.11	22.88	1.48	9.97	4.38	583.24
Abu Dhabi (ADI)	9,749.27	-0.16	-0.16	-0.39	2.08	-4.52	2.45	15.40	2.24	2,733.51
Bahrain (BAX)	1,952.51	-0.04	0.01	-1.62	-0.27	3.02	0.77	9.40	5.97	7.11
Muscat SE INDEX	4,769.35	-0.06	-0.14	-0.14	0.02	-1.81	0.87	10.39	4.69	6.66
SP GCC Comp LMC	179.45	-0.19	0.14	-3.22	0.24	0.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.79	-0.10	-0.10	-1.08	4.05	1.67				
Developed Markets										
MSCI World Index	2,935.71	0.81	0.81	-4.20	-1.05	12.80				
U.S. (S&P 500)	4,433.31	0.63	0.63	-3.39	-0.38	15.47	3.92	22.44	2.04	38,824.18
U.K. (FTSE 100)	7,338.58	0.00	0.00	-4.69	-2.56	-1.52	1.54	10.30	4.02	1,981.96
Japan (topix)	2,299.81	1.47	1.47	-0.98	0.49	21.57	1.34	13.70	2.23	831,168.98
Emerging Markets										
MSCI EM Index	978.09	0.73	0.73	-6.57	-1.15	2.27				
China (SSE Composite)	3,098.64	1.13	1.13	-5.85	-3.23	0.30	1.36	12.00		44,025.04
India (Sensex)	64,996.60	0.17	0.17	-2.30	0.43	6.83	4.12	22.68	1.24	127,846.93

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,016.93	-0.38	-0.50	-3.26	-0.18	-3.77	1.48	15.86	3.22	45.69
Kuwait Premier Index	7,725.95	-0.38	-0.51	-4.15	-1.07	-4.80	1.65	17.52	3.04	36.72
Kuwait Main Index	5,649.62	-0.35	-0.44	0.35	3.40	0.94	1.04	11.13	3.96	8.97
Kuwait Sector										
Banking	1,701.83	-0.43	-0.61	-3.80	-0.23	-5.13	1.73	17.89	2.69	28.95
Telecom	1,102.08	-0.44	-0.49	-1.02	-1.37	-6.72	1.68	10.30	6.38	3.40
Industrials	956.60	-0.27	-0.42	-4.47	-4.63	-11.33	1.08	16.86	2.92	3.37
Financial Services	1,256.73	0.04	-0.36	-2.60	2.42	-0.04	1.00	15.47	3.89	3.99
Real Estate	1,220.35	-0.72	-0.26	-2.38	1.06	0.96	0.95	15.30	2.05	2.64
Basic Materials	876.14	-0.39	0.67	-0.79	-3.44	1.27	1.53	9.81	8.89	0.50
Health Care	482.72	0.00	0.00	6.26	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	603.49	0.00	-0.29	-2.92	-1.89	25.74	1.38	76.40	2.04	0.18
Insurance	2,202.88	-0.58	-0.50	1.09	4.40	42.05	1.25	7.41	4.21	0.89
Consumer Discretionary	1,626.47	-0.06	0.06	-5.49	4.26	9.39				
Energy	1,001.03	-0.10	-0.19	0.21	-1.80	-12.08	0.79	10.17	5.07	0.21
Technology	563.81	0.00	0.00	-2.27	-16.58	-19.02	0.70			0.01
Utilities	513.16	0.52	0.52	-3.47	-2.50	3.72				



What Move the GCC markets

Oil Prices

Oil was little changed on Monday after China took steps to bolster its flagging economy, though investors remained worried about the pace of growth as well as further U.S. interest rate hikes that could dampen demand. Brent crude slipped 15 cents, or 0.2%, to \$84.33

Kuwait Market

The market closed down by – 0.38% at 7,016.93 value traded 22.9 million KD, Premier market value reached 16.2 million KD down – 0.38% at 7,725.95

KSA Market

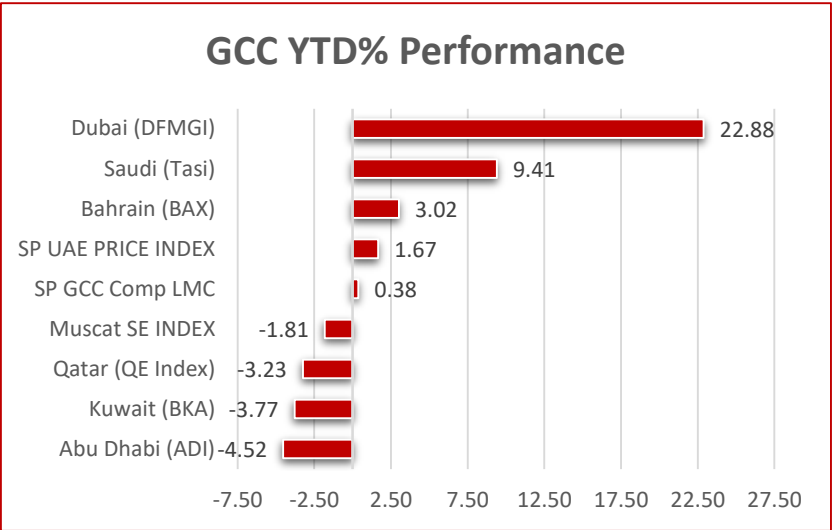
The market closed down today by - 0.05% at 11,464.26



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.918	-0.76	-1.40	-4.57	-1.82	-10.58	13.87	1.77	3.68	7.29
KFH	0.748	-0.27	-0.40	-5.20	0.40	-0.02	19.48	1.91	2.25	11.05
ZAIN	0.513	-0.58	-0.58	-1.54	-0.97	-8.88	10.57	1.79	6.82	2.22
BOUBYAN BANK	0.618	0.16	0.65	-0.32	-3.44	-17.91	40.90	2.54	0.92	2.45
AGILITY	0.596	-0.33	-0.67	-5.40	-4.33	-17.22	22.12	0.80	0.00	1.60
Saudi Arabia										
ARAMCO	34.55	-0.72	-0.29	6.64	7.13	18.40	16.46	5.47	3.91	8,361.10
SABIC	88.40	0.00	0.68	3.15	0.23	-1.12	66.90	1.50	4.30	265.20
STC	40.30	0.12	1.00	-4.95	-7.36	10.11	16.23	2.66	3.97	201.50
AL-RAJHI BANK	72.30	-0.28	0.00	-3.08	-0.96	-3.86	16.96	2.80	2.46	289.20
NCB	35.80	-0.28	0.56	-7.13	-2.72	-5.01	11.31	1.25	3.63	214.80
Abu Dhabi										
ETISALAT.AD	19.78	-1.10	-1.10	-11.70	-11.70	-13.47	17.46	4.12	4.04	172.01
FAB.AD	13.80	-0.72	-0.72	-5.74	1.17	-19.30	11.69	1.31	3.77	152.45
EMIRATES NBD	17.45	1.16	1.16	2.65	17.51	34.23	5.67	1.12	3.44	110.22
DB ISLAMIC DB	5.66	-0.35	-0.35	-1.57	3.47	-0.70	7.53	0.98	5.30	40.98
EMAR.DU	6.90	0.00	0.00	2.07	7.64	17.75	7.72	0.86	3.62	60.98
Qatar										
QNB	15.860	-0.88	-0.69	-6.60	2.85	-11.89	10.63	1.42	3.78	146.41
INDUSTREIS QAT	12.500	0.00	-1.57	-6.23	11.31	-2.42	14.48	2.02	8.80	75.58
QA ISLAMIC BK	19.720	-0.25	0.15	-6.76	11.35	6.25	11.77	1.69	3.17	46.57
MASRAF AL RAYA	2.273	-0.66	-0.39	-9.44	-11.31	-28.32	20.38	0.88	4.40	21.13
MESAIEED PETRO	1.873	-0.90	-0.37	-3.95	-1.42	-11.94	17.91	1.42	5.87	23.52
Oman										
BANK MUSCAT	0.284	0.00	0.00	1.43	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.017	-0.29	-0.29	2.21	2.52	10.54	32.89	1.22	3.20	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	0.298	1.36	0.00	3.11	6.43	3.11	10.90	0.74	2.48	0.48
OMINVEST	0.390	-0.51	0.00	0.26	3.17	-7.14	5.73	0.87	3.85	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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Leading Sector, Security Performance

Kuwait
The market is down today by – 0.38%. The leading sector bottom performance indices today are Real Estate - 0.72 % , Insurance - 0.58 % , Telecom - 0.44 % respectively

KSA
Saudi Armco has a negative performance today by - 0.72 % , SABIC has a flat performance today, STC has a positive performance today by + 0.12%, Al Rajhi Bank has a negative performance today by - 0.28%

U.A.E
ETISALAT .AD has a negative performance today by - 1.10 % , FAB.AD has a negative performance today by – 0.72 %



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