



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 2nd 2023



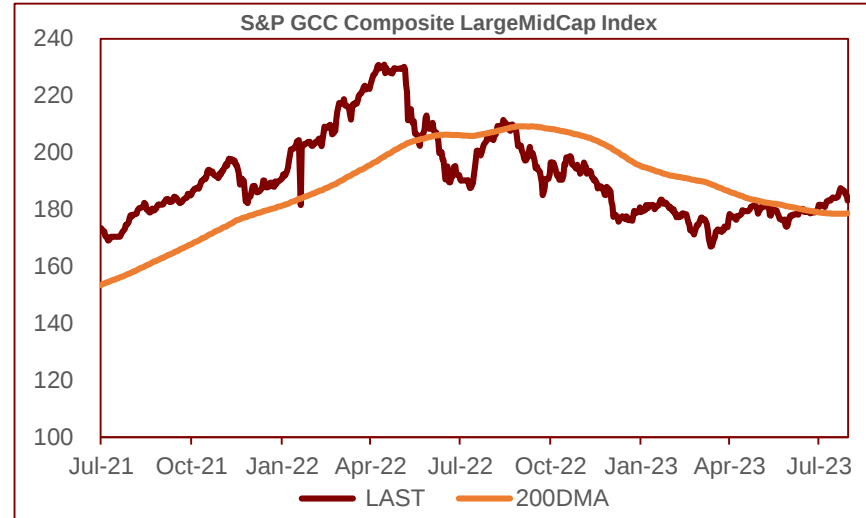


Market Watch

Wednesday, August 2, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,478.28	-1.36	-3.12	-1.83	0.17	9.54	10,900 SAR	1.99	18.44
Qatar (QE Index)	10,983.36	-1.12	0.81	0.19	9.02	2.83	579 QAR	1.43	12.06
Dubai (DFMGI)	4,083.71	0.16	1.35	0.60	7.69	22.41	587 AED	1.59	21.66
Abu Dhabi (ADI)	9,826.11	0.49	0.68	0.40	2.89	-3.77	1,435 AED	1.90	21.17
Bahrain (BAX)	1,988.48	-0.18	0.20	0.20	1.56	4.92	9 BHD	6.29	18.00
MUSCAT SE INDEX	4,799.15	0.19	0.40	0.48	0.65	-1.20	5 OMR	0.99	13.25
SP GCC Comp LMC	183.18	-1.07	-2.07	-1.21	2.33	2.46			
SP UAE PRICE INDEX	142.33	0.40	1.41	0.71	5.94	3.51			
Developed Markets									
MSCI World Index	3,000.53	-1.58	-1.12	-2.08	1.14	15.29			
U.S. (S&P 500)	4,513.39	-1.38	-0.53	-1.65	1.42	17.55			
U.K. (FTSE 100)	7,561.63	-1.36	-1.70	-1.79	0.40	1.47			
Japan (Topix)	2,301.76	-1.52	0.29	-0.90	0.58	21.68			
Emerging Markets									
MSCI EM Index	1,020.00	-2.21	-1.46	-2.57	3.08	6.65			
China (SSE Composite)	3,261.69	-0.89	1.40	-0.89	1.86	5.58			
India (Sensex)	65,782.78	-1.02	-0.73	-1.12	1.64	8.12			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,188.82	-0.57	-1.03	-0.90	2.26	-1.42	46.39 KWD	1.72	17.43
Kuwait Premier Index	7,979.79	-0.69	-1.32	-1.01	2.18	-1.67	36.14 KWD	1.66	16.99
Kuwait Main Index	5,604.87	-0.08	0.18	-0.45	2.59	0.14	10.25 KWD	1.93	19.05
NIC 50	9,294.93	1.96	-1.33	-1.02	2.17	2.32	28.60 KWD	1.64	15.99
Kuwait Sector									
Banking	1,751.30	-0.70	-1.07	-1.00	2.67	-2.38	29.42 KWD	1.18	17.99
Telecom	1,108.85	-0.47	-0.88	-0.42	-0.77	-6.15	3.40 KWD	1.35	8.84
Industrials	989.59	-0.57	-2.79	-1.18	-1.34	-8.28	3.50 KWD	0.80	18.01
Financial services	1,277.80	0.12	-1.52	-0.97	4.14	1.64	3.69 KWD	0.76	18.59
Real estate	1,243.27	-0.66	0.24	-0.54	2.96	2.86	2.69 KWD	0.63	22.97
Basic materials	878.69	-0.42	-0.14	-0.50	-3.16	1.57	0.78 KWD	1.40	8.12
Health care	454.28	0.00	0.00	0.00	1.08	-1.64	0.23 KWD	0.95	6.62
Consumer services	616.20	-0.99	-0.44	-0.88	0.18	28.39	0.83 KWD	0.88	14.43
Insurance	2,164.64	-0.37	1.58	-0.66	2.59	39.58	0.89 KWD	0.88	10.19
Consumer Disc	1,717.18	-0.23	0.75	-0.22	10.07	15.49	0.19 KWD	1.14	0.00
Energy	999.49	-0.02	-0.12	0.06	-1.95	-12.21	0.21 KWD	0.73	4.45
Technology	560.90	-5.98	-6.88	-2.78	-17.01	-19.44	0.01 KWD	0.69	0.00
Utilities	526.32	-0.99	0.00	-0.99	0.00	6.38	0.22 KWD	2.01	16.38



What Move the GCC markets

Oil Prices

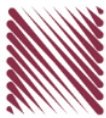
Oil prices rose slightly in early Asian trading on Thursday, as markets weighed bullish U.S. inventory data on Wednesday and a likely extension of OPEC+ output cuts against the fallout of Fitch's downgrade of the U.S. government's top credit. Brent crude futures rose 27 cents, or 0.32%, to \$83.47 a barrel.

Kuwait Market

The market down by -0.57% at 7,188.82 value traded 48.7 million KD, Premier market value traded reached 38.1 million KD down -0.69% at 7,979.79

KSA Market

The market closed down today by -1.36% at 11,478.28



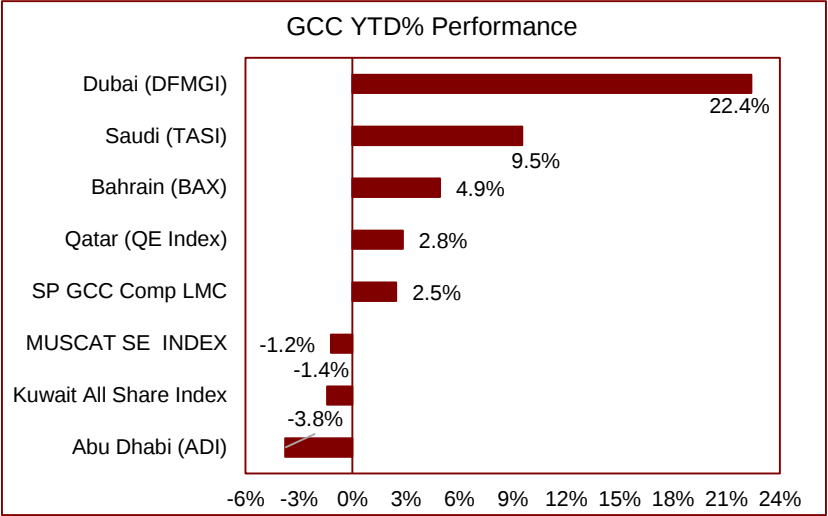
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.955	-0.52	-1.55	-0.73	2.14	-6.98	7.58 KWD	1.84	27.00
KFH	0.778	-1.14	-1.02	-1.39	4.43	3.99	11.49 KWD	1.99	32.00
Zain	0.519	-0.19	-0.38	-0.38	0.19	-7.82	2.25 KWD	1.75	11.06
BOUBYAN BANK	0.619	0.00	-0.96	-0.16	-3.28	-17.78	2.45 KWD	2.54	34.00
Agility	0.632	-0.16	-1.86	0.32	1.44	-12.22	1.69 KWD	0.89	22.78
Saudi Arabia									
ARAMCO	32.25	0.00	-0.15	-0.46	0.00	10.51	7,798.68 SAR	5.23	13.88
SABIC	85.40	0.35	-1.27	-0.35	-3.17	-4.47	256.01 SAR	1.37	35.00
STC	41.40	-1.19	-7.69	-2.36	-4.83	13.11	206.85 SAR	2.76	16.80
AL-RAJHI BANK	72.00	-2.57	-4.51	-3.49	-1.37	-4.26	287.79 SAR	2.79	17.33
NCB	37.80	-2.58	-5.26	-1.95	2.72	0.29	226.63 SAR	1.32	12.28
United Arab Emirates									
ETISALAT.AD	22.40	0.00	0.63	0.00	0.00	-2.01	206.60 AED	5.10	21.10
FAB.AD	14.38	-0.69	-1.78	-1.78	5.43	-15.91	158.87 AED	1.36	12.19
EMIRATES NBD	17.05	-0.29	2.40	0.29	14.81	31.15	107.70 AED	1.09	5.54
DB ISLAMIC BK	5.77	-0.35	1.05	0.35	5.48	1.23	41.78 AED	1.00	7.68
EMAAR PROPERT	7.05	0.57	5.07	4.29	9.98	20.31	62.32 AED	0.87	7.43
Qatar									
QNB	17.00	-0.87	1.19	0.12	10.25	-5.56	156.86 QAR	1.52	11.39
INDUSTRIES QAT	13.70	0.00	2.39	2.78	21.99	6.95	82.80 QAR	2.27	11.39
QA ISLAMIC BK	21.00	-1.69	2.44	-0.71	18.58	13.15	49.57 QAR	1.80	12.54
MASRAF AL RAYA	2.52	-0.44	0.32	0.28	-1.79	-20.62	23.38 QAR	0.98	22.57
MESAIEED PETRO	2.02	-1.61	3.44	3.44	6.16	-5.17	25.31 QAR	1.55	15.91
OMAN									
BANK MUSCAT	0.280	0.00	0.36	0.00	1.45	1.82	2.10 OMR	0.94	8.33
OMANTEL	0.999	12.50	0.10	0.40	0.71	8.59	0.75 OMR	1.23	7.69
BANK DHOFAR	0.176	0.00	1.15	1.15	1.73	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.300	0.00	3.45	3.81	7.14	3.81	0.49 QAR	0.75	12.71
OMINVEST	0.376	0.53	-1.83	-3.34	-0.53	-10.48	0.25 QAR	0.70	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.57 %The leading sector bottom performance indices today are Technology -5.98 % Utilities -0.99 % Consumer services -0.99 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.35%. STC have negative performance today by -1.19 %, Al Rajhi Bank have negative performance today by -2.57 %

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD have negative performance today by - 0.69 %



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