



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 30th 2023

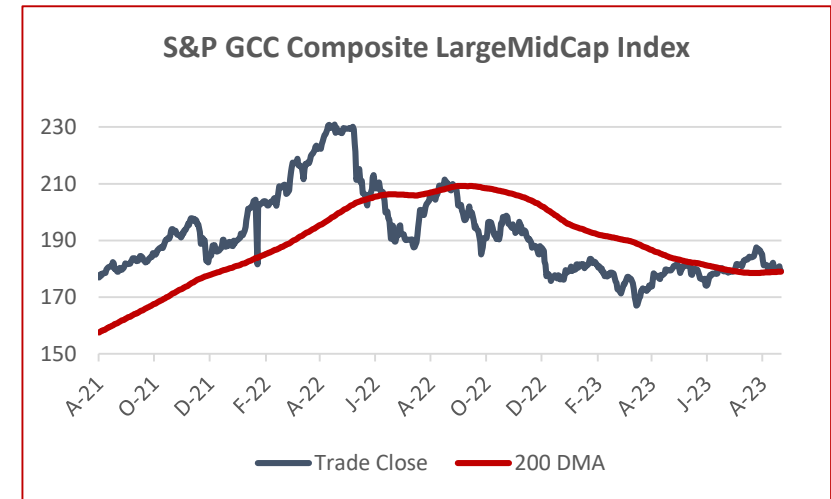




Wednesday, August 30, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,574.75	1.16	1.49	-1.00	1.01	10.46	2.10	18.77	3.33	11,536.25
Qatar (QE Index)	10,350.12	-0.20	-0.14	-5.59	2.73	-3.10	1.24	12.45	4.75	530.03
Dubai (DFMGI)	4,067.18	-0.43	-0.79	0.19	7.26	21.92	1.48	9.92	4.40	578.36
Abu Dhabi (ADI)	9,744.22	-0.18	-0.22	-0.44	2.03	-4.57	2.45	15.41	2.24	2,722.71
Bahrain (BAX)	1,952.44	-0.19	0.01	-1.62	-0.28	3.02	0.77	9.41	5.97	7.11
Muscat SE INDEX	4,760.30	-0.43	-0.33	-0.33	-0.17	-2.00	0.87	10.39	4.69	6.65
SP GCC Comp LMC	180.43	0.54	0.69	-2.69	0.79	0.93	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.29	-0.23	-0.45	-1.43	3.68	1.30				
Developed Markets										
MSCI World Index	2,991.52	0.54	2.73	-2.38	0.84	14.94				
U.S. (S&P 500)	4,514.87	0.38	2.48	-1.61	1.45	17.59	4.00	22.90	2.00	39,644.84
U.K. (FTSE 100)	7,473.67	0.12	1.84	-2.93	-0.77	0.29	1.58	10.47	3.95	2,018.38
Japan (topix)	2,313.38	0.43	2.07	-0.40	1.08	22.29	1.35	13.78	2.21	835,814.25
Emerging Markets										
MSCI EM Index	988.30	0.07	1.78	-5.60	-0.12	3.34				
China (SSE Composite)	3,137.14	0.04	2.38	-4.68	-2.03	1.55	1.36	12.00		44,025.04
India (Sensex)	65,087.25	0.02	0.31	-2.17	0.57	6.98	4.12	22.71	1.24	128,075.55

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,019.87	-0.01	-0.45	-3.22	-0.14	-3.73	1.48	15.78	3.23	45.55
Kuwait Premier Index	7,725.03	-0.11	-0.52	-4.17	-1.08	-4.81	1.65	17.44	3.05	36.63
Kuwait Main Index	5,663.60	0.40	-0.19	0.60	3.66	1.19	1.03	11.05	3.98	8.92
Kuwait Sector										
Banking	1,699.05	-0.12	-0.78	-3.96	-0.39	-5.29	1.73	17.81	2.70	28.83
Telecom	1,112.25	0.16	0.43	-0.11	-0.46	-5.86	1.68	10.34	6.36	3.41
Industrials	951.26	0.00	-0.97	-5.01	-5.16	-11.83	1.07	16.70	2.95	3.34
Financial Services	1,268.58	0.34	0.58	-1.68	3.39	0.90	1.00	15.20	3.87	4.02
Real Estate	1,228.99	0.36	0.44	-1.69	1.78	1.68	0.95	15.23	2.06	2.63
Basic Materials	869.94	0.19	-0.04	-1.49	-4.13	0.56	1.51	9.69	9.00	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	602.80	0.00	-0.40	-3.03	-2.00	25.60	1.38	76.40	2.05	0.18
Insurance	2,228.75	0.53	0.67	2.28	5.63	43.71	1.25	7.42	4.21	0.89
Consumer Discretionary	1,611.49	-0.19	-0.87	-6.36	3.30	8.38				
Energy	982.81	-1.94	-2.00	-1.61	-3.59	-13.68	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	507.89	-0.52	-0.52	-4.46	-3.50	2.66				



What Move the GCC markets

Oil Prices

Oil prices extended gains on Wednesday after industry data showed a large draw in crude inventories in the U.S., the world's biggest fuel consumer, and as a hurricane in the Gulf of Mexico kept investors on edge. Brent crude futures for October rose by 46 cents, or 0.5%, to \$85.95 a barrel.

Kuwait Market

The market closed down by - 0.01% at 7,019.87 value traded 27.4 million KD, Premier market value reached 18.9 million KD down - 0.11% at 7,725.03

KSA Market

The market closed up today by + 1.16% at 11,574.75

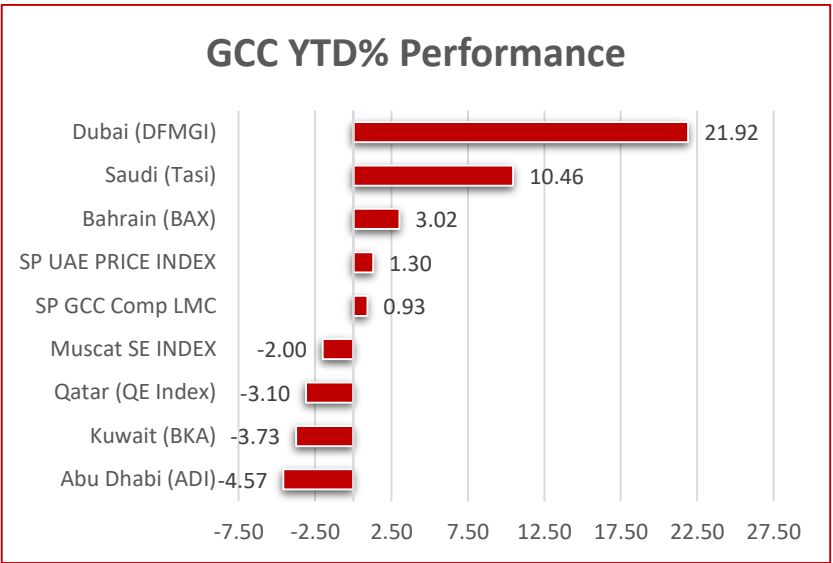


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.915	0.00	-1.72	-4.89	-2.14	-10.88	13.83	1.76	3.70	7.25
KFH	0.749	-0.13	-0.27	-5.07	0.54	0.11	19.51	1.91	2.25	11.05
ZAIN	0.516	0.00	0.00	-0.96	-0.39	-8.35	10.63	1.80	6.78	2.23
BOUBYAN BANK	0.617	-0.48	0.49	-0.48	-3.59	-18.04	40.83	2.53	0.92	2.44
AGILITY	0.586	0.00	-2.33	-6.98	-5.94	-18.61	21.75	0.79	0.00	1.57
Saudi Arabia										
ARAMCO	34.85	2.20	0.58	7.56	8.06	19.42	16.60	5.52	3.88	8,433.92
SABIC	89.60	0.67	2.05	4.55	1.59	0.22	67.81	1.52	4.24	268.81
STC	40.35	0.75	1.13	-4.83	-7.24	10.25	16.25	2.66	3.97	201.76
AL-RAJHI BANK	72.50	0.14	0.28	-2.82	-0.68	-3.59	17.00	2.81	2.45	290.01
NCB	36.20	1.12	1.69	-6.10	-1.63	-3.95	11.43	1.27	3.59	217.21
Abu Dhabi										
ETISALAT.AD	19.94	-0.20	-0.30	-10.98	-10.98	-12.77	17.60	4.15	4.01	173.44
FAB.AD	13.88	0.00	-0.14	-5.19	1.76	-18.83	11.76	1.32	3.75	153.36
EMIRATES NBD	16.55	-1.78	-4.06	-2.65	11.45	27.31	5.37	1.06	3.63	104.55
DB ISLAMIC DB	5.68	0.71	0.00	-1.22	3.84	-0.35	7.56	0.98	5.28	41.13
EMAR.DU	7.05	1.59	2.17	4.29	9.98	20.31	7.89	0.88	3.55	62.32
Qatar										
QNB	15.880	-0.19	-0.56	-6.48	2.98	-11.78	10.64	1.42	3.78	146.72
INDUSTREIS QAT	12.470	-0.87	-1.81	-6.45	11.04	-2.65	14.45	2.01	8.82	75.47
QA ISLAMIC BK	19.880	-0.10	0.96	-6.00	12.25	7.11	11.87	1.71	3.14	46.99
MASRAF AL RAYA	2.255	0.00	-1.18	-10.16	-12.02	-28.89	20.22	0.88	4.43	20.98
MESAIEED PETRO	1.874	0.21	-0.32	-3.90	-1.37	-11.89	17.92	1.42	5.87	23.55
Oman										
BANK MUSCAT	0.285	0.00	0.35	1.79	3.26	3.64	11.22	0.96	5.26	2.14
OMANTEL	1.020	-0.49	0.00	2.51	2.82	10.87	32.99	1.22	3.19	0.77
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	0.296	-0.67	-0.67	2.42	5.71	2.42	10.83	0.74	2.50	0.48
OMINVEST	0.397	1.28	1.79	2.06	5.03	-5.48	5.83	0.88	3.78	0.27

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
The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by - 0.01%. The leading sector bottom performance indices today are Energy - 1.94 % , Utilities - 0.52 % , Banking - 0.12 % respectively

KSA
Saudi Armco has a positive performance today by + 2.20 % , SABIC has a positive performance today by + 0.67 % , STC has a positive performance today by + 0.75% , Al Rajhi Bank has a positive performance today by + 0.14%

U.A.E
ETISALAT .AD has a negative performance today by - 0.20 % , FAB.AD has a flat performance today



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw