



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

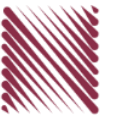
GCC DAILY MORNING BRIEF

Monday, July 31th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

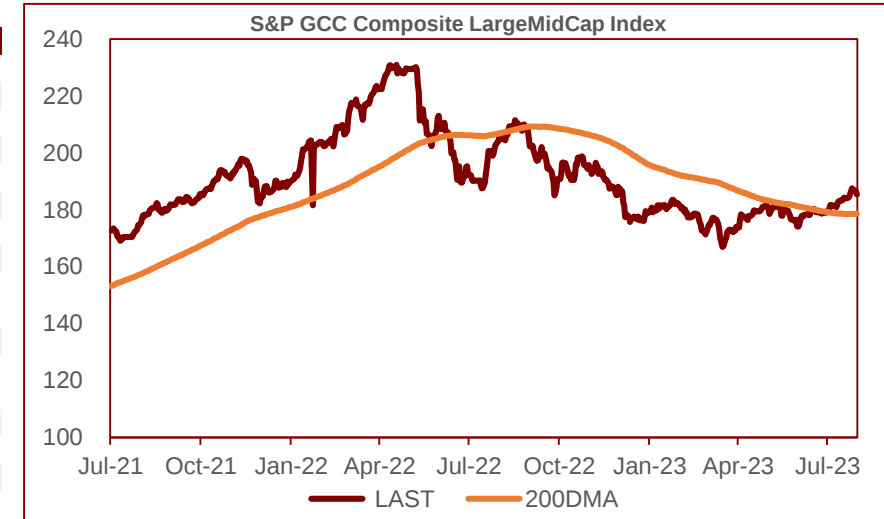


Market Watch

Monday, July 31, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,692.23	-0.82	-1.31	2.04	2.04	11.58	11,013 SAR	2.02	18.80
Qatar (QE Index)	10,962.95	0.08	0.63	8.82	8.82	2.64	578 QAR	1.43	12.19
Dubai (DFMGI)	4,059.27	0.55	0.75	7.05	7.05	21.68	584 AED	1.59	19.12
Abu Dhabi (ADI)	9,787.13	0.27	0.28	2.48	2.48	-4.15	1,435 AED	1.87	22.20
Bahrain (BAX)	1,992.41	0.00	0.00	1.76	1.76	4.7	9 BHD	6.29	18.00
MUSCAT SE INDEX	4,776.10	-0.06	-0.08	0.17	0.17	-1.67	5 OMR	0.99	13.25
SP GCC Comp LMC	185.43	-0.56	-0.87	3.58	3.58	3.72			
SP UAE PRICE INDEX	141.32	0.79	0.69	5.19	5.19	2.78			
Developed Markets									
MSCI World Index	3,064.30	0.21	0.99	3.29	3.29	17.74			
U.S. (S&P 500)	4,588.96	0.15	1.14	3.11	3.11	19.52			
U.K. (FTSE 100)	7,699.41	0.07	0.09	2.23	2.23	3.32			
Japan (Topix)	2,322.56	1.39	1.19	1.48	1.48	22.78			
Emerging Markets									
MSCI EM Index	1,046.91	0.36	1.14	5.80	5.80	9.47			
China (SSE Composite)	3,291.04	0.46	2.31	2.78	2.78	6.53			
India (Sensex)	66,527.67	0.56	0.39	2.80	2.80	9.35			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,253.76	-0.29	-0.13	3.19	3.19	-0.53	46.75 KWD	1.74	17.67
Kuwait Premier Index	8,060.86	-0.38	-0.32	3.22	3.22	-0.68	36.46 KWD	1.68	17.19
Kuwait Main Index	5,630.06	0.11	0.63	3.05	3.05	0.59	10.29 KWD	1.94	19.42
NIC 50	9,294.93	1.96	-0.33	3.21	3.21	2.32	28.60 KWD	1.66	16.19
Kuwait Sector									
Banking	1,769.05	-0.11	-0.07	3.71	3.71	-1.39	29.67 KWD	1.19	18.19
Telecom	1,113.49	-1.02	-0.47	-0.35	-0.35	-5.75	3.42 KWD	1.36	8.89
Industrials	1,001.39	-1.35	-1.63	-0.17	-0.17	-7.18	3.53 KWD	0.81	20.21
Financial services	1,290.31	-0.63	-0.56	5.16	5.16	2.63	3.73 KWD	0.78	18.71
Real estate	1,250.08	0.00	0.79	3.53	3.53	3.42	2.70 KWD	0.63	22.48
Basic materials	883.10	0.31	0.36	-2.68	-2.68	2.08	0.78 KWD	1.41	8.12
Health care	454.28	0.00	0.00	1.08	1.08	-1.64	0.23 KWD	0.95	6.62
Consumer services	621.65	0.67	0.44	1.07	1.07	29.52	0.83 KWD	0.88	14.26
Insurance	2,179.06	1.01	2.25	3.27	3.27	40.51	0.89 KWD	0.87	10.19
Consumer Disc	1,720.93	-0.10	0.97	10.31	10.31	15.74	0.19 KWD	1.14	0.00
Energy	998.92	-0.20	-0.18	-2.01	-2.01	-12.26	0.21 KWD	0.71	4.49
Technology	576.91	0.00	-4.23	-14.64	-14.64	-17.14	0.01 KWD	0.71	0.00
Utilities	531.58	1.00	1.00	1.00	1.00	7.45	0.22 KWD	2.03	16.54



What Move the GCC markets

Oil Prices

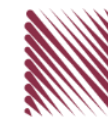
Oil price were little changed on Tuesday, trading near a three-month high reached on Monday, on signs of tightening global supply as producers implement output cuts and strong demand in the United States, the world's biggest fuel consumer. Brent crude futures for October were at \$85.30 a barrel.

Kuwait Market

The market down by -0.29% at 7,253.76 value traded 52.8 million KD, Premier market value traded reached 41.9 million KD down -0.38% at 8,060.86

KSA Market

The market closed down today by -0.82% at 11,692.23



DAILY MARKETS WRAP,

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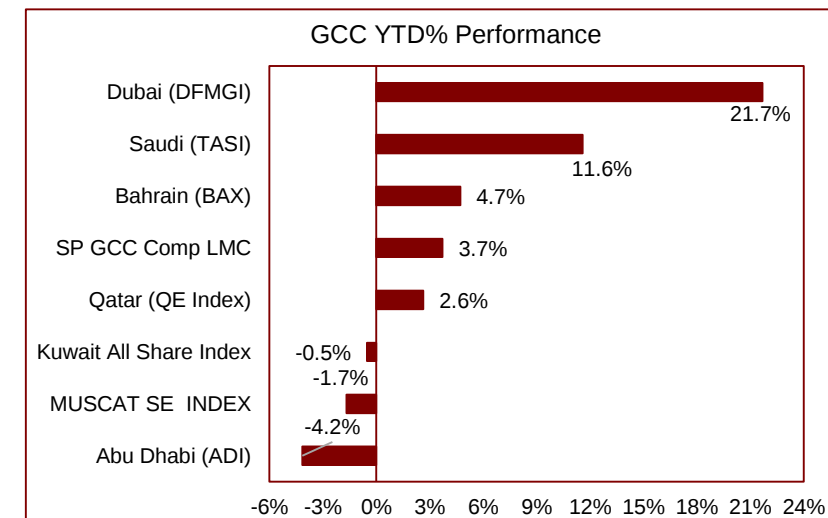
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.962	-0.62	-0.82	2.89	2.89	-6.30	7.63 KWD	1.85	27.00
KFH	0.789	0.25	0.38	5.91	5.91	5.46	11.65 KWD	2.02	32.00
Zain	0.521	-1.14	0.00	0.58	0.58	-7.46	2.25 KWD	1.76	11.11
BOUBYAN BANK	0.620	-0.16	-0.80	-3.13	-3.13	-17.64	2.46 KWD	2.54	34.00
Agility	0.630	-1.56	-2.17	1.12	1.12	-12.50	1.69 KWD	0.88	22.71
Saudi Arabia									
ARAMCO	32.40	0.31	0.31	0.47	0.47	11.03	7,842.89 SAR	5.25	13.90
SABIC	85.70	-0.81	-0.92	-2.83	-2.83	-4.14	257.17 SAR	1.38	35.00
STC	42.40	-4.40	-5.46	-2.53	-2.53	15.85	212.06 SAR	2.83	17.78
AL-RAJHI BANK	74.60	-0.53	-1.06	2.19	2.19	-0.80	298.48 SAR	3.01	17.83
NCB	38.55	-2.90	-3.38	4.76	4.76	2.28	231.36 SAR	1.34	12.57
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	14.64	1.10	0.00	7.33	7.33	-14.39	161.75 AED	1.39	12.41
EMIRATES NBD	17.00	2.41	2.10	14.48	14.48	30.77	107.39 AED	1.09	5.52
DB ISLAMIC BK	5.75	0.35	0.70	5.12	5.12	0.88	41.64 AED	1.00	7.65
EMAAR PROPERT	6.76	0.60	0.75	5.46	5.46	15.36	59.75 AED	0.84	7.12
Qatar									
QNB	16.98	0.47	1.07	10.12	10.12	-5.67	156.83 QAR	1.52	11.38
INDUSTRIES QAT	13.33	-2.98	-0.37	18.70	18.70	4.06	80.65 QAR	2.21	11.08
QA ISLAMIC BK	21.15	2.27	3.17	19.42	19.42	13.95	49.98 QAR	1.81	12.63
MASRAF AL RAYA	2.51	-1.14	0.04	-2.07	-2.07	-20.85	23.34 QAR	0.97	22.51
MESAIEED PETRO	1.95	-0.86	0.00	2.63	2.63	-8.32	24.50 QAR	1.50	15.38
OMAN									
BANK MUSCAT	0.280	0.00	0.36	1.45	1.45	1.82	2.11 OMR	0.94	8.33
OMANTEL	0.995	12.05	-0.30	0.30	0.30	8.15	0.75 OMR	1.22	7.69
BANK DHOFAR	0.174	0.00	0.00	0.58	0.58	-0.57	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.289	-0.34	-0.34	3.21	3.21	0.00	0.47 QAR	0.72	12.71
OMINVEST	0.389	1.57	1.57	2.91	2.91	-7.38	0.26 QAR	0.73	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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Leading Sector, Security Performance

Kuwait

The market is down today by -0.29 %The leading sector bottom performance indices today are Industrials -1.35 % Telecom -1.02 % Financial services -0.63 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.31 %, SABIC have negative performance today by -0.81%. STC have negative performance today by -4.4 %, Al Rajhi Bank have negative performance today by -0.53 %.

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD has a positive performance today by + 1.1 %



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