



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

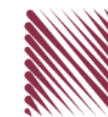
GCC DAILY MORNING BRIEF

Thursday, August 3rd 2023



DAILY MARKETS WRAP,

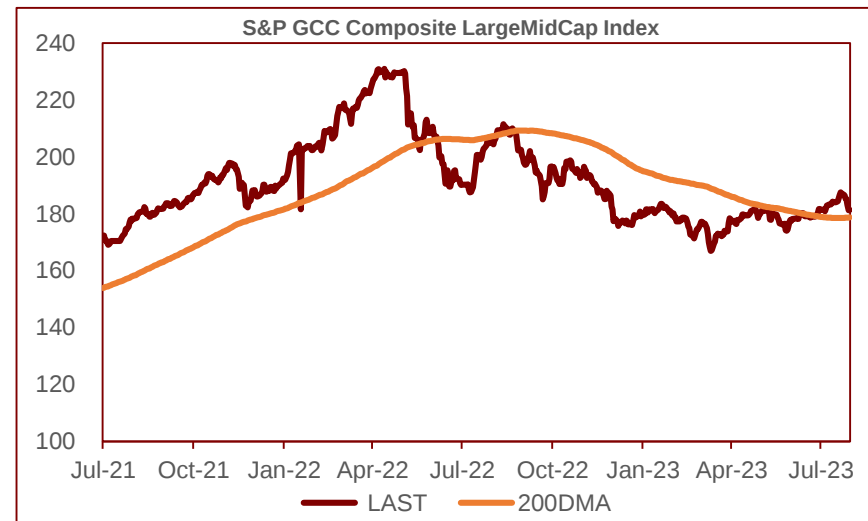
NIC RESEARCH AND STUDIES DEP



Market Watch

Thursday, August 3, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,375.78	-0.89	-3.98	-2.71	-0.73	8.56	10,879 SAR	1.97	18.29
Qatar (QE Index)	10,798.98	-1.68	-0.88	-1.50	7.19	1.10	574 QAR	1.42	11.64
Dubai (DFMGI)	4,083.18	-0.80	0.54	-0.20	6.84	21.44	585 AED	1.60	21.52
Abu Dhabi (ADI)	9,786.42	-0.43	0.25	-0.04	2.44	-4.19	1,435 AED	1.87	21.40
Bahrain (BAX)	1,982.42	-0.30	-0.11	-0.11	1.25	4.60	9 BHD	6.28	18.00
MUSCAT SE INDEX	4,783.36	-0.33	0.07	0.15	0.32	-1.53	5 OMR	0.99	13.25
SP GCC Comp LMC	181.34	-1.08	-3.13	-2.28	1.22	1.36			
SP UAE PRICE INDEX	141.66	-0.91	0.48	-0.21	4.98	2.57			
Developed Markets									
MSCI World Index	2,986.54	-0.35	-1.46	-2.42	0.79	14.89			
U.S. (S&P 500)	4,478.03	-0.25	-0.78	-1.90	1.16	17.25			
U.K. (FTSE 100)	7,564.37	-0.43	-2.13	-2.21	-0.03	1.04			
Japan (Topix)	2,274.63	-1.45	-1.17	-2.33	-0.88	19.91			
Emerging Markets									
MSCI EM Index	1,018.02	-0.41	-1.87	-2.97	2.66	6.21			
China (SSE Composite)	3,288.08	0.58	1.98	-0.32	2.45	6.19			
India (Sensex)	65,721.25	-0.82	-1.55	-1.93	0.81	7.23			



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,145.07	-0.61	-1.63	-1.50	1.64	-2.02	46.07 KWD	1.72	17.40
Kuwait Premier Index	7,933.39	-0.58	-1.90	-1.58	1.59	-2.25	35.90 KWD	1.66	16.91
Kuwait Main Index	5,564.65	-0.72	-0.54	-1.16	1.85	-0.57	10.17 KWD	1.94	19.19
NIC 50	9,294.93	1.96	-1.91	-1.59	1.58	2.32	28.60 KWD	1.64	15.91
Kuwait Sector									
Banking	1,736.53	-0.84	-1.90	-1.84	1.80	-3.20	29.16 KWD	1.16	17.91
Telecom	1,104.48	-0.39	-1.27	-0.81	-1.16	-6.52	3.39 KWD	1.34	8.80
Industrials	985.93	-0.37	-3.15	-1.54	-1.71	-8.62	3.49 KWD	0.84	18.23
Financial services	1,273.46	-0.34	-1.86	-1.31	3.79	1.29	3.66 KWD	0.76	21.29
Real estate	1,239.50	-0.30	-0.07	-0.85	2.65	2.55	2.68 KWD	0.62	22.67
Basic materials	866.25	-1.42	-1.56	-1.91	-4.53	0.13	0.77 KWD	1.38	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	614.15	-0.33	-0.78	-1.21	-0.15	27.96	0.83 KWD	0.88	14.43
Insurance	2,209.30	2.06	3.67	1.39	4.71	42.46	0.90 KWD	0.90	11.16
Consumer Disc	1,721.07	0.23	0.98	0.01	10.32	15.75	0.19 KWD	1.14	0.00
Energy	997.13	-0.24	-0.36	-0.18	-2.18	-12.42	0.21 KWD	0.71	4.45
Technology	595.09	6.10	-1.21	3.15	-11.95	-14.53	0.01 KWD	0.74	0.00
Utilities	510.53	-3.00	-3.00	-3.96	-3.00	3.19	0.21 KWD	1.95	15.89

What Move the GCC markets

Oil Prices

Oil prices rose more than a dollar a barrel on Friday to record a sixth consecutive week of gains, after top producers Saudi Arabia and Russia extended supply cuts through September, adding to undersupply concerns. Brent crude futures rose \$1.10, or 1.3%, to settle at \$86.24 a barrel.

Kuwait Market

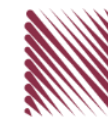
The market down by -0.61% at 7,145.07 value traded 44.5 million KD, Premier market value traded reached 34.6 million KD down -0.58% at 7,933.39

KSA Market

The market closed down today by -0.89% at 11,375.78

DAILY MARKETS WRAP,

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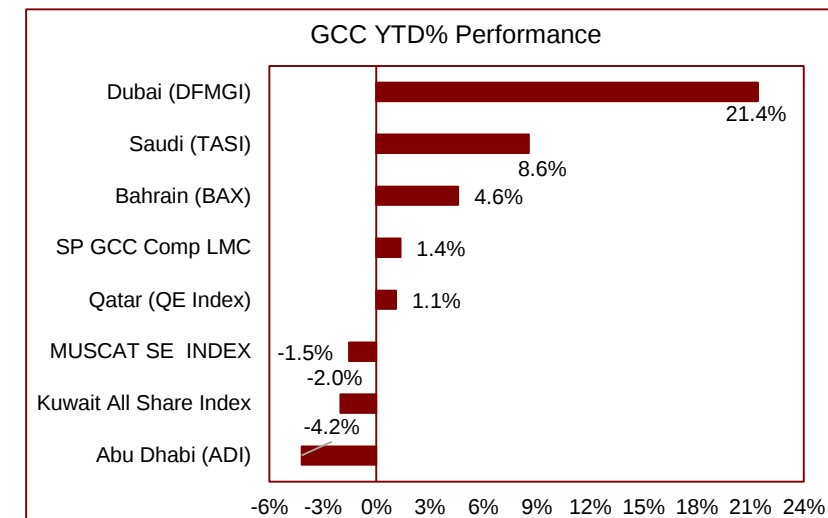
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.952	-0.31	-1.86	-1.04	1.82	-7.27	7.54 KWD	1.83	27.00
KFH	0.770	-1.03	-2.04	-2.41	3.36	2.92	11.36 KWD	1.97	32.00
Zain	0.518	-0.19	-0.58	-0.58	0.00	-7.99	2.24 KWD	1.75	11.04
BOUBYAN BANK	0.625	0.97	0.00	0.81	-2.34	-16.98	2.48 KWD	2.56	34.00
Agility	0.628	-0.63	-2.48	-0.32	0.80	-12.78	1.68 KWD	0.88	22.64
Saudi Arabia									
ARAMCO	32.25	0.00	-0.15	-0.46	0.00	10.51	7,802.83 SAR	5.23	13.88
SABIC	85.00	-0.47	-1.73	-0.82	-3.63	-4.92	254.95 SAR	1.36	35.00
STC	41.50	0.24	-7.47	-2.12	-4.60	13.39	207.46 SAR	2.77	16.60
AL-RAJHI BANK	71.40	-0.83	-5.31	-4.29	-2.19	-5.05	285.54 SAR	2.77	16.89
NCB	37.25	-1.46	-6.64	-3.37	1.22	-1.17	223.45 SAR	1.30	11.96
United Arab Emirates									
ETISALAT.AD	22.08	-1.43	-0.81	-1.43	-1.43	-3.41	206.60 AED	5.10	21.10
FAB.AD	14.50	0.83	-0.96	-0.96	6.30	-15.20	159.07 AED	1.37	12.29
EMIRATES NBD	16.50	-3.23	-0.90	-2.94	11.11	26.92	107.37 AED	1.09	5.36
DB ISLAMIC BK	5.82	0.87	1.93	1.22	6.40	2.11	41.85 AED	1.00	7.75
EMAAR PROPERT	6.93	-1.70	3.28	2.51	8.11	18.26	62.48 AED	0.88	7.30
Qatar									
QNB	17.00	0.00	1.19	0.12	10.25	-5.56	157.02 QAR	1.52	11.39
INDUSTRIES QAT	13.68	-0.15	2.24	2.63	21.82	6.79	82.76 QAR	2.27	11.37
QA ISLAMIC BK	19.70	-6.19	-3.90	-6.86	11.24	6.14	46.55 QAR	1.69	11.76
MASRAF AL RAYA	2.50	-0.68	-0.36	-0.40	-2.46	-21.16	23.25 QAR	0.97	22.42
MESAIEED PETRO	1.97	-2.33	1.03	1.03	3.68	-7.38	24.75 QAR	1.52	15.54
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	0.175	-0.57	0.57	0.57	1.16	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.296	-1.33	2.07	2.42	5.71	2.42	0.48 QAR	0.74	12.71
OMINVEST	0.377	0.27	-1.57	-3.08	-0.26	-10.24	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-July 23	24.37%	15.18%	0.07%	1.78%	0.24%	5.10%	17.58%	13.78%	6.19%	4.59%
2-August 23	24.38%	15.05%	0.07%	1.93%	0.24%	5.03%	17.57%	13.73%	6.14%	4.56%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.61 % The leading sector bottom performance indices today are Utilities -3 % Basic materials -1.42 % Banking -0.84 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -0.47 %. STC has a positive performance today by + 0.24 %, Al Rajhi Bank have negative performance today by -0.83 %

U.A.E

ETISALAT.AD have negative performance today by -1.43 %, FAB.AD has a positive performance today by + 0.83 %



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