

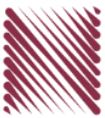


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 3rd 2023

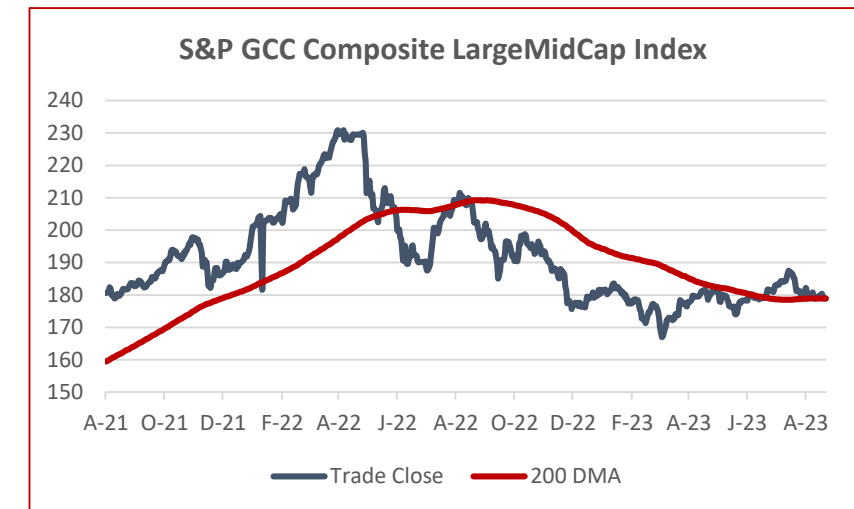




Sunday, September 3, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,491.20	-0.31	-0.31	-0.31	-0.03	9.33	2.09	18.62	3.35	11,405.53
Qatar (QE Index)	10,194.74	-0.09	-0.09	-0.09	1.11	-4.64	1.22	12.25	4.83	520.74
Dubai (DFMGI)	4,090.04	0.18	-0.23	0.18	7.86	22.60	1.48	9.96	4.39	581.42
Abu Dhabi (ADI)	9,786.63	-0.24	0.22	-0.24	2.47	-4.16	2.45	15.41	2.24	2,738.04
Bahrain (BAX)	1,952.16	0.23	0.23	0.23	-0.06	3.24	0.77	9.44	5.95	7.12
Muscat SE INDEX	4,798.97	-0.51	-0.51	-0.51	0.13	-1.71	0.87	10.40	4.69	6.66
SP GCC Comp LMC	179.02	-0.05	-0.05	-0.02	-0.04	0.09	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.89	0.00	0.00	0.13	3.38	1.01				
Developed Markets										
MSCI World Index	2,989.51	0.12	2.66	0.12	0.77	14.86				
U.S. (S&P 500)	4,515.77	0.18	2.50	0.18	1.47	17.61	4.01	22.97	1.99	39,799.91
U.K. (FTSE 100)	7,464.54	0.34	1.72	0.34	-0.89	0.17	1.57	10.45	3.94	2,015.00
Japan (topix)	2,349.75	0.76	3.68	0.76	2.67	24.21	1.37	14.00	2.18	848,627.85
Emerging Markets										
MSCI EM Index	985.68	0.55	1.51	0.55	-0.38	3.06				
China (SSE Composite)	3,133.25	0.43	2.26	0.43	-2.15	1.42	1.36	12.00		44,025.04
India (Sensex)	65,387.16	0.86	0.77	0.86	1.03	7.47	4.24	22.57	1.23	127,181.28

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,005.84	-0.22	-0.22	-0.22	-0.56	-4.14	1.48	15.71	3.23	45.46
Kuwait Premier Index	7,695.15	-0.06	-0.06	-0.06	-1.52	-5.24	1.64	17.35	3.07	36.46
Kuwait Main Index	5,692.59	-0.85	-0.85	-0.85	3.30	0.84	1.04	11.05	3.95	9.00
Kuwait Sector										
Banking	1,698.27	-0.30	-0.30	-0.30	-0.73	-5.61	1.72	17.78	2.71	28.79
Telecom	1,104.56	0.22	0.22	0.22	-0.94	-6.31	1.67	10.28	6.39	3.39
Industrials	940.66	-0.06	-0.06	-0.06	-6.27	-12.86	1.05	16.39	2.98	3.31
Financial Services	1,269.87	-0.01	-0.01	-0.01	3.49	1.00	1.01	14.96	3.85	4.04
Real Estate	1,214.96	-0.08	-0.08	-0.08	0.54	0.44	0.94	15.05	2.08	2.61
Basic Materials	880.48	-1.53	-1.53	-1.53	-4.45	0.22	1.53	9.82	8.88	0.50
Health Care	482.72	0.00	0.00	0.00	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	608.65	0.28	0.28	0.28	-0.77	27.17	1.40	76.84	2.03	0.19
Insurance	2,251.99	0.05	0.05	0.05	6.78	45.28	1.27	7.53	4.14	0.91
Consumer Discretionary	1,600.07	-1.62	-1.62	-1.62	0.90	5.87				
Energy	995.55	0.21	0.21	0.21	-2.13	-12.37	0.79	10.11	5.10	0.21
Technology	582.00	0.00	0.00	0.00	-13.89	-16.41	0.72			0.01
Utilities	510.53	0.52	0.52	0.52	-2.50	3.72				



What Move the GCC markets

Oil Prices

Oil prices ticked up in Asian morning trade on Monday, as market sentiment was buoyed by positive China and U.S. economic data, as well as expectations of ongoing crude supply cuts from major producers. Brent crude was up 17 cents, or 0.2%, at \$88.72 a barrel.

Kuwait Market

The market closed down by – 0.22% at 7,005.84 value traded 29.6 million KD, Premier market value reached 21.1 million KD down - 0.06% at 7,695.15

KSA Market

The market closed down today by – 0.31% at 11,491.20

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



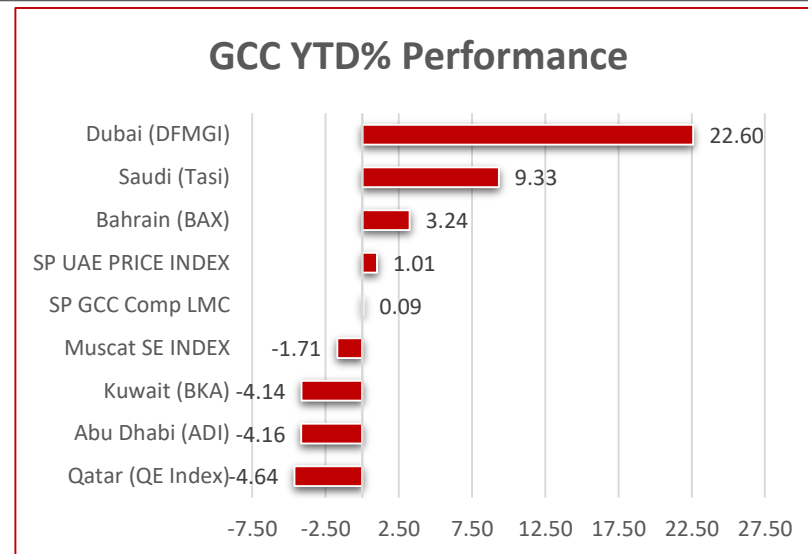
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.919	-0.11	-0.11	-0.11	-1.71	-10.49	13.89	1.77	3.68	7.28
KFH	0.746	0.13	0.13	0.13	0.13	-0.29	19.43	1.91	2.25	11.00
ZAIN	0.511	0.20	0.20	0.20	-1.35	-9.24	10.53	1.79	6.85	2.21
BOUBYAN BANK	0.608	-0.33	-0.33	-0.33	-5.00	-19.24	40.24	2.49	0.93	2.41
AGILITY	0.576	0.17	0.17	0.17	-7.54	-20.00	21.38	0.78	0.00	1.54
Saudi Arabia										
ARAMCO	34.45	-1.29	-1.29	-1.29	6.82	18.05	16.41	5.45	3.92	8,337.57
SABIC	90.00	1.81	1.81	1.81	2.04	0.67	68.11	1.53	4.22	270.02
STC	39.90	0.25	0.25	0.25	-8.28	9.02	16.07	2.63	4.01	199.52
AL-RAJHI BANK	72.20	0.00	0.00	0.00	-1.10	-3.99	16.93	2.80	2.46	288.82
NCB	35.90	0.42	0.42	0.42	-2.45	-4.75	11.34	1.26	3.62	215.42
Abu Dhabi										
ETISALAT.AD	19.60	-1.21	-2.00	-1.21	-12.50	-14.26	17.30	4.08	4.08	170.46
FAB.AD	13.60	-0.58	-2.16	-0.58	-0.29	-20.47	11.52	1.29	3.82	150.25
EMIRATES NBD	16.70	2.14	-3.19	2.14	12.46	28.46	5.42	1.07	3.59	105.49
DB ISLAMIC DB	5.64	0.00	-0.70	0.00	3.11	-1.05	7.51	0.98	5.32	40.84
EMAR.DU	7.08	0.28	2.61	0.28	10.45	20.82	7.92	0.88	3.53	62.58
Qatar										
QNB	15.500	-0.64	-0.64	-0.64	0.52	-13.89	10.38	1.39	3.87	143.26
INDUSTREIS QAT	12.410	0.40	0.40	0.40	10.51	-3.12	14.38	2.01	8.86	75.13
QA ISLAMIC BK	19.360	0.21	0.21	0.21	9.32	4.31	11.56	1.66	3.23	45.78
MASRAF AL RAYA	2.220	0.00	0.00	0.00	-13.38	-29.99	19.91	0.86	4.50	20.66
MESAIEED PETRO	1.840	0.00	0.00	0.00	-3.16	-13.49	17.59	1.39	5.98	23.13
Oman										
BANK MUSCAT	0.284	-0.35	-0.35	-0.35	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.019	-1.07	-1.07	-1.07	2.72	10.76	32.96	1.22	3.19	0.76
BANK DHOFAR	0.175	0.00	0.00	0.00	1.16	0.00	20.09	0.73	2.86	0.52
NAT BANK OF OMAN	0.296	0.00	0.00	0.00	5.71	2.42	10.83	0.74	2.50	0.48
OMINVEST	0.400	0.50	0.50	0.50	5.82	-4.76	5.88	0.89	3.75	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-August 23	24.37%	15.00%	0.07%	2.21%	0.23%	5.13%	17.55%	13.60%	6.12%	4.67%
30-August 23	24.38%	14.96%	0.07%	2.17%	0.24%	5.16%	17.53%	13.56%	6.12%	4.7%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by - 0.22%. The leading sector bottom performance indices today are , Consumer Discretionary - 1.62 % , Basic Materials – 1.53 % , Banking - 0.30 % respectively

KSA

Saudi Armco has a negative performance today by – 1.29%, SABIC has a positive performance today by + 1.81 % , STC has a positive performance today by + 0.25%, Al Rajhi Bank has a flat performance today by 0%

U.A.E

ETISALAT .AD has a negative performance today by – 1.21 % , FAB.AD has a negative performance today by -0.58



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