



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

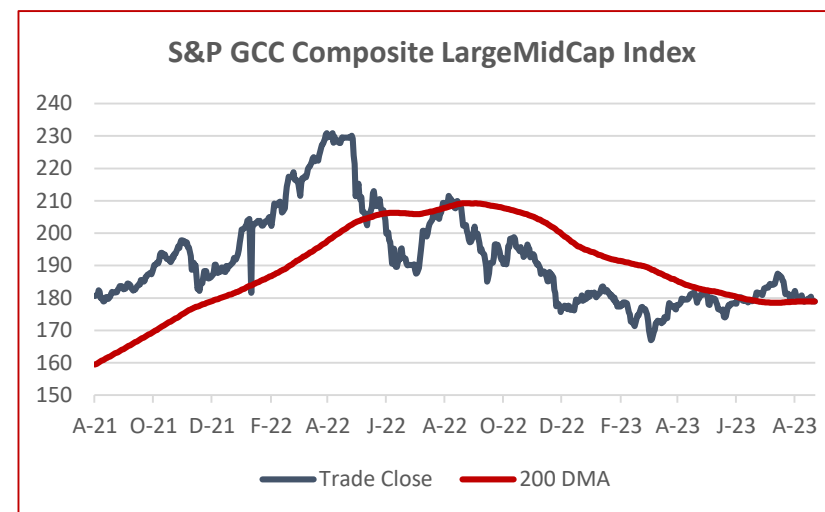
Monday, September 4th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,430.87	-0.22	-0.53	-0.53	-0.25	9.09	2.08	18.58	3.37	11,363.21
Qatar (QE Index)	10,131.32	-0.54	-0.62	-0.62	0.56	-5.15	1.22	12.18	4.85	517.99
Dubai (DFMGI)	4,068.65	-0.52	-0.52	-0.35	7.30	21.96	1.48	9.91	4.40	579.22
Abu Dhabi (ADI)	9,748.23	-0.39	-0.39	-0.63	2.07	-4.53	2.44	15.33	2.25	2,731.72
Bahrain (BAX)	1,961.98	0.27	0.50	0.50	0.21	3.52	0.77	9.47	5.93	7.14
Muscat SE INDEX	4,757.62	-0.35	-0.86	-0.86	-0.22	-2.05	0.86	10.34	4.71	6.62
SP GCC Comp LMC	177.84	-0.61	-0.66	-0.63	-0.66	-0.53	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.75	-0.82	-0.82	-0.69	2.53	0.18				
Developed Markets										
MSCI World Index	2,990.17	0.02	0.02	0.14	0.79	14.89				
U.S. (S&P 500)	4,515.77	0.00	0.00	0.18	1.47	17.61	4.01	22.97	1.99	39,799.91
U.K. (FTSE 100)	7,452.76	-0.16	-0.16	0.18	-1.05	0.01	1.57	10.43	3.95	2,011.29
Japan (topix)	2,373.73	1.02	1.02	1.79	3.72	25.48	1.38	14.14	2.16	857,247.68
Emerging Markets										
MSCI EM Index	995.50	1.00	1.00	1.55	0.61	4.09				
China (SSE Composite)	3,177.06	1.40	1.40	1.83	-0.78	2.84	1.36	12.00		44,025.04
India (Sensex)	65,628.14	0.37	0.37	1.23	1.41	7.87	4.26	22.65	1.22	127,782.05
Kuwait										
Kuwait All Share Index	6,943.35	-0.67	-0.89	-0.89	-1.23	-4.78	1.47	15.67	3.24	45.36
Kuwait Premier Index	7,621.42	-0.90	-0.96	-0.96	-2.41	-6.09	1.64	17.35	3.07	36.44
Kuwait Main Index	5,656.06	0.21	-0.64	-0.64	3.52	1.06	1.03	10.94	3.98	8.92
Kuwait Sector										
Banking	1,680.72	-0.74	-1.03	-1.03	-1.47	-6.31	1.72	17.74	2.71	28.71
Telecom	1,103.75	-0.29	-0.07	-0.07	-1.22	-6.58	1.67	10.30	6.38	3.40
Industrials	931.61	-0.91	-0.96	-0.96	-7.12	-13.65	1.05	16.37	2.98	3.30
Financial Services	1,259.60	-0.80	-0.81	-0.81	2.66	0.19	1.01	14.87	3.85	4.04
Real Estate	1,214.10	0.01	-0.07	-0.07	0.55	0.45	0.94	15.04	2.08	2.60
Basic Materials	859.52	-0.86	-2.38	-2.38	-5.28	-0.65	1.51	9.67	9.02	0.49
Health Care	475.76	-1.44	-1.44	-1.44	5.86	3.01	1.75	12.41	1.78	0.24
Consumer Staples	608.65	-0.28	0.00	0.00	-1.05	26.82	1.40	76.99	2.02	0.19
Insurance	2,250.61	-0.11	-0.06	-0.06	6.66	45.12	1.27	7.57	4.14	0.91
Consumer Discretionary	1,566.44	-0.49	-2.10	-2.10	0.41	5.35				
Energy	974.68	-2.31	-2.10	-2.10	-4.38	-14.39	0.79	10.13	5.09	0.21
Technology	560.17	-3.75	-3.75	-3.75	-17.12	-19.54	0.72			0.01
Utilities	507.89	-1.03	-0.52	-0.52	-3.50	2.66				



What Move the GCC markets

Oil Prices

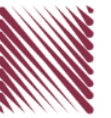
Oil prices ticked up in Asian morning trade on Monday, as market sentiment was buoyed by positive China and U.S. economic data, as well as expectations of ongoing crude supply cuts from major producers. Brent crude was up 17 cents, or 0.2%, at \$88.72 a barrel.

Kuwait Market

The market closed down by – 0.67% at 6,943.35 value traded 41.8 million KD, Premier market value reached 30.2 million KD down - 0.90% at 7,621.42

KSA Market

The market closed down today by – 0.22% at 11,430.87



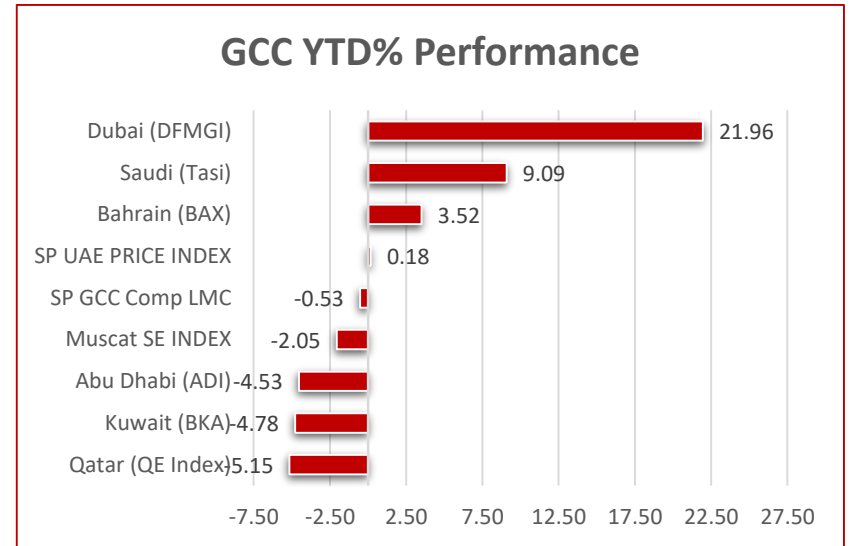
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.911	-0.87	-0.98	-0.98	-2.57	-11.27	13.77	1.75	3.71	7.23
KFH	0.736	-1.34	-1.21	-1.21	-1.21	-1.63	19.17	1.88	2.29	10.87
ZAIN	0.510	-0.20	0.00	0.00	-1.54	-9.41	10.50	1.78	6.86	2.21
BOUBAYAN BANK	0.607	-0.16	-0.49	-0.49	-5.16	-19.37	40.17	2.49	0.93	2.41
AGILITY	0.565	-1.91	-1.74	-1.74	-9.31	-21.53	20.97	0.76	0.00	1.51
Saudi Arabia										
ARAMCO	34.30	-0.44	-1.72	-1.72	6.36	17.54	16.34	5.43	3.94	8,301.04
SABIC	89.90	-0.11	1.70	1.70	1.93	0.56	68.04	1.53	4.23	269.71
STC	38.95	-2.38	-2.14	-2.14	-10.46	6.42	15.69	2.57	4.11	194.76
AL-RAJHI BANK	71.90	-0.42	-0.42	-0.42	-1.51	-4.39	16.86	2.79	2.47	287.62
NCB	35.95	0.14	0.56	0.56	-2.31	-4.61	11.35	1.26	3.61	215.71
Abu Dhabi										
ETISALAT.AD	19.00	-3.06	-3.06	-4.23	-15.18	-16.89	16.77	3.96	4.21	165.25
FAB.AD	13.44	-1.18	-1.18	-1.75	-1.47	-21.40	11.39	1.28	3.87	148.49
EMIRATES NBD	16.65	-0.30	-0.30	1.83	12.12	28.08	5.41	1.07	3.60	105.18
DB ISLAMIC DB	5.65	0.18	0.18	0.18	3.29	-0.88	7.52	0.98	5.31	40.91
EMAR.DU	7.13	0.71	0.71	0.99	11.23	21.67	7.98	0.89	3.51	63.02
Qatar										
QNB	15.330	-1.10	-1.73	-1.73	-0.58	-14.83	10.27	1.37	3.91	141.59
INDUSTREIS QAT	12.630	1.77	2.18	2.18	12.47	-1.41	14.63	2.04	8.71	76.41
QA ISLAMIC BK	19.080	-1.45	-1.24	-1.24	7.74	2.80	11.39	1.64	3.28	45.08
MASRAF AL RAYA	2.185	-1.58	-1.58	-1.58	-14.75	-31.09	19.59	0.85	4.58	20.32
MESAIEED PETRO	1.840	0.00	0.00	0.00	-3.16	-13.49	17.59	1.39	5.98	23.12
Oman										
BANK MUSCAT	0.28	-1.41	-1.75	-1.75	1.45	1.82	11.02	0.94	5.36	2.10
OMANTEL	1.017	-0.20	-1.26	-1.26	2.52	10.54	32.89	1.22	3.20	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	0.00	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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Leading Sector, Security Performance

Kuwait

The market is down today by - 0.67%. The leading sector bottom performance indices today are , Technology – 3.75 % , Energy – 2.31 % , Health Care – 1.44 % respectively

KSA

Saudi Armco has a negative performance today by – 0.44%, SABIC has a negative performance today by – 0.11 % , STC has a negative performance today by – 2.38%, Al Rajhi Bank has a negative performance today by – 0.42%

U.A.E

ETISALAT .AD has a negative performance today by – 3.06 % , FAB.AD has a negative performance today by – 1.18



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