



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, August 7th 2023



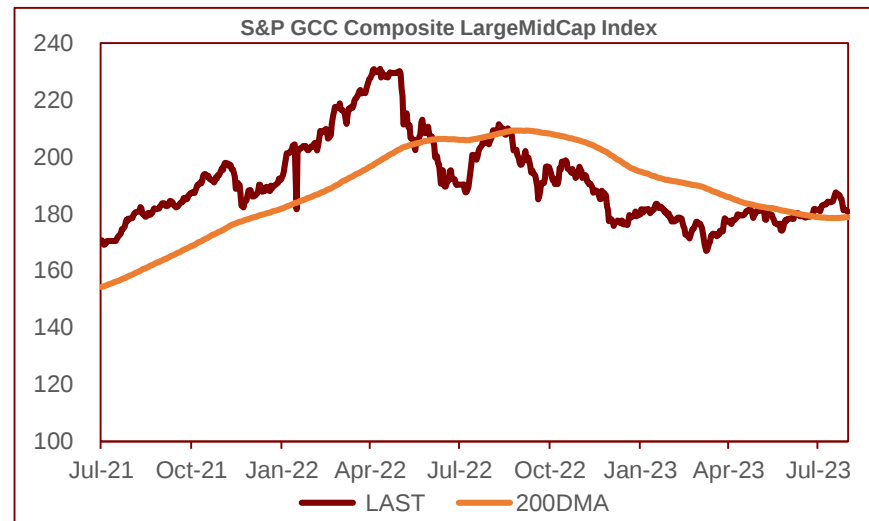


Market Watch

Monday, August 7, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,271.94	-0.70	-0.91	-3.59	-1.63	7.57	10,931 SAR	1.90	18.20
Qatar (QE Index)	10,803.54	-0.16	0.04	-1.45	7.24	1.15	571 QAR	1.41	11.83
Dubai (DFMGI)	4,079.42	-0.09	0.70	0.50	7.58	22.28	585 AED	1.61	21.63
Abu Dhabi (ADI)	9,824.20	0.39	0.42	0.38	2.87	-3.79	1,435 AED	1.82	21.09
Bahrain (BAX)	1,976.21	-0.28	-0.31	-0.42	0.94	4.27	9 BHD	6.63	18.00
MUSCAT SE INDEX	4,777.04	0.37	-0.13	0.02	0.19	-1.66	5 OMR	0.99	13.25
SP GCC Comp LMC	180.67	-0.35	-0.30	-2.57	0.92	1.06			
SP UAE PRICE INDEX	142.06	0.29	0.73	0.53	5.74	3.32			
Developed Markets									
MSCI World Index	3,003.77	0.58	0.46	-1.98	1.25	15.41			
U.S. (S&P 500)	4,518.44	0.90	0.37	-1.54	1.53	17.68			
U.K. (FTSE 100)	7,554.49	-0.13	0.34	-1.88	0.30	1.38			
Japan (Topix)	2,283.93	0.41	0.69	-1.66	-0.20	20.73			
Emerging Markets									
MSCI EM Index	1,016.31	-0.17	0.05	-2.92	2.71	6.27			
China (SSE Composite)	3,268.83	-0.59	-0.35	-0.67	2.09	5.81			
India (Sensex)	65,953.48	0.35	1.09	-0.86	1.91	8.40			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,204.97	0.67	0.84	-0.67	2.49	-1.20	46.47 KWD	1.74	17.44
Kuwait Premier Index	7,989.91	0.60	0.71	-0.88	2.31	-1.55	36.17 KWD	1.67	17.10
Kuwait Main Index	5,639.56	0.97	1.35	0.17	3.22	0.76	10.31 KWD	1.95	18.69
NIC 50	9,294.93	1.96	0.70	-0.89	2.30	2.32	28.60 KWD	1.65	16.10
Kuwait Sector									
Banking	1,755.23	0.76	1.08	-0.78	2.90	-2.16	29.47 KWD	1.16	18.10
Telecom	1,107.64	0.52	0.29	-0.53	-0.87	-6.25	3.40 KWD	1.34	8.80
Industrials	999.90	0.51	1.42	-0.15	-0.32	-7.32	3.54 KWD	0.85	18.32
Financial services	1,277.56	0.70	0.32	-0.99	4.12	1.62	3.67 KWD	0.75	21.16
Real estate	1,242.86	0.56	0.27	-0.58	2.93	2.83	2.69 KWD	0.62	22.19
Basic materials	866.94	0.54	0.08	-1.83	-4.46	0.21	0.77 KWD	1.38	8.12
Health care	455.79	0.00	0.33	0.33	1.41	-1.31	0.23 KWD	0.96	6.69
Consumer services	596.35	-0.68	-2.90	-4.07	-3.05	24.25	0.82 KWD	0.88	14.43
Insurance	2,217.75	0.70	0.38	1.78	5.11	43.00	0.91 KWD	0.89	11.89
Consumer Disc	1,714.20	-0.53	-0.40	-0.39	9.88	15.29	0.18 KWD	1.11	0.00
Energy	1,011.57	1.41	1.45	1.27	-0.77	-11.15	0.21 KWD	0.74	4.45
Technology	589.27	0.00	-0.98	2.14	-12.81	-15.36	0.01 KWD	0.73	0.00
Utilities	521.05	4.21	2.06	-1.98	-1.00	5.32	0.22 KWD	1.99	16.22



What Move the GCC markets

Oil Prices

Oil prices rose in early trade on Tuesday as supply concerns arising from production cuts by Saudi Arabia and Russia supported the market. Brent crude futures rose 37 cents, or 0.4%, to \$85.71 a barrel.

Kuwait Market

The market up by 0.67% at 7,204.97 value traded 41.6 million KD, Premier market value traded reached 33.1 million KD up 0.60% at 7,989.91

KSA Market

The market closed down today by -0.70% at 11,271.94



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.954	0.53	0.21	-0.83	2.03	-7.08	7.57 KWD	1.84	27.00
KFH	0.776	0.52	0.78	-1.65	4.16	3.72	11.46 KWD	1.98	32.00
Zain	0.520	0.58	0.39	-0.19	0.39	-7.64	2.25 KWD	1.75	11.09
BOUBYAN BANK	0.637	1.27	1.92	2.74	-0.47	-15.39	2.53 KWD	2.61	34.00
Agility	0.640	0.95	1.91	1.59	2.73	-11.11	1.71 KWD	0.90	23.07
Saudi Arabia									
ARAMCO	32.65	1.08	1.24	0.77	1.24	11.88	7,895.82 SAR	5.30	15.72
SABIC	85.00	0.00	0.00	-0.82	-3.63	-4.92	254.82 SAR	1.36	35.00
STC	40.00	-2.56	-3.61	-5.66	-8.05	9.29	199.86 SAR	2.67	16.50
AL-RAJHI BANK	71.10	-0.14	-0.42	-4.69	-2.60	-5.45	284.20 SAR	2.76	16.70
NCB	36.60	-1.48	-1.74	-5.06	-0.54	-2.89	219.45 SAR	1.28	11.76
United Arab Emirates									
ETISALAT.AD	22.06	-0.18	-0.09	-1.52	-1.52	-3.50	206.60 AED	5.10	21.10
FAB.AD	14.44	0.28	-0.41	-1.37	5.87	-15.56	159.54 AED	1.37	12.24
EMIRATES NBD	17.05	0.29	3.33	0.29	14.81	31.15	107.71 AED	1.09	5.54
DB ISLAMIC BK	5.76	-0.35	-1.03	0.17	5.30	1.05	41.71 AED	1.00	7.67
EMAAR PROPERT	7.08	0.14	2.16	4.73	10.45	20.82	62.59 AED	0.88	7.46
Qatar									
QNB	16.90	0.00	-0.59	-0.47	9.60	-6.11	155.97 QAR	1.52	11.32
INDUSTRIES QAT	13.50	-1.46	-1.32	1.28	20.21	5.39	81.61 QAR	2.24	11.22
QA ISLAMIC BK	20.39	1.24	3.50	-3.59	15.13	9.86	48.14 QAR	1.75	12.17
MASRAF AL RAYA	2.51	0.52	0.56	0.16	-1.91	-20.72	23.36 QAR	0.98	22.55
MESAIIEED PETRO	1.95	-0.71	-1.02	0.00	2.63	-8.32	24.48 QAR	1.50	15.38
OMAN									
BANK MUSCAT	0.280	0.00	0.00	0.00	1.45	1.82	2.11 OMR	0.94	8.33
OMANTEL	0.999	12.50	0.00	0.40	0.71	8.59	0.75 OMR	1.23	7.69
BANK DHOFAR	0.178	1.71	1.71	2.30	2.89	1.71	0.53 QAR	0.75	14.93
NAT BANK OF OMAN	0.294	0.00	-0.68	1.73	5.00	1.73	0.48 QAR	0.73	12.71
OMINVEST	0.379	0.00	0.53	-2.57	0.26	-9.76	0.25 QAR	0.71	6.85

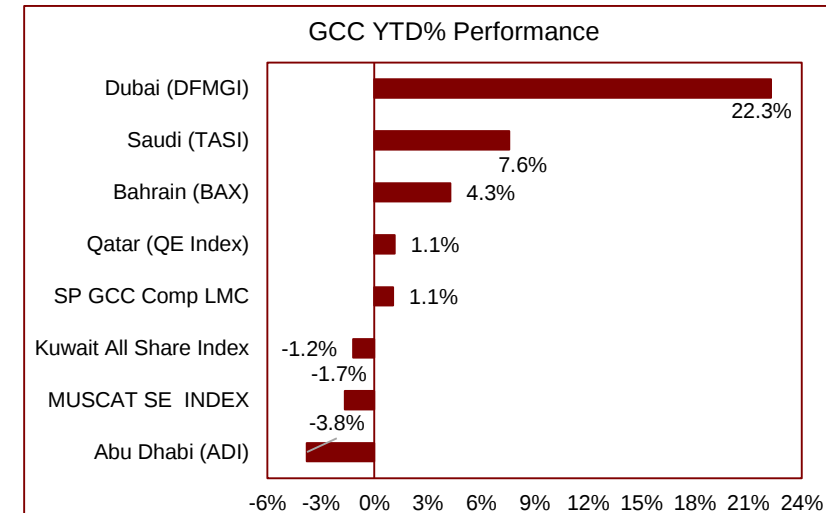
Foreign Holding

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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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.67 %The leading sector best performance indices today are Utilities 4.21 % Energy 1.41 % Banking 0.76 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.08 %, SABIC flat performance today 0 %. STC have negative performance today by -2.56 %, Al Rajhi Bank have negative performance today by -0.14 %

U.A.E

ETISALAT .AD have negative performance today by -0.18 %, FAB.AD has a positive performance today by + 0.28 %



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