



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, September 7th 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)	11,215.56	-0.73	-2.40	-2.40	-2.12	7.03	2.05	18.27	3.42	11,264.07
Qatar (QE Index)	10,237.64	0.96	0.42	0.42	1.62	-4.15	1.23	12.31	4.80	522.76
Dubai (DFMGI)	4,067.45	0.21	-0.55	-0.38	7.26	21.92	1.48	9.93	4.40	580.86
Abu Dhabi (ADI)	9,690.52	0.32	-0.98	-1.22	1.47	-5.10	2.43	15.27	2.26	2,714.38
Bahrain (BAX)	1,941.88	-0.05	-0.53	-0.53	-0.82	2.46	0.77	9.38	6.00	7.06
Muscat SE INDEX	4,690.02	-0.67	-2.27	-2.27	-1.64	-3.45	0.85	10.23	4.76	6.55
SP GCC Comp LMC	175.91	0.00	-1.74	-1.71	-1.73	-1.60	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.30	0.00	-1.14	-1.01	2.20	-0.14				
Developed Markets										
MSCI World Index	2,947.11	0.06	-1.36	-1.25	-0.60	13.30				
U.S. (S&P 500)	4,451.14	-0.32	-1.43	-1.25	0.02	15.93	3.95	22.68	2.03	39,299.95
U.K. (FTSE 100)	7,478.19	0.49	0.18	0.53	-0.71	0.35	1.56	10.46	3.93	2,016.14
Japan (topix)	2,359.02	-1.02	0.39	1.16	3.08	24.70	1.37	14.05	2.17	852,022.45
Emerging Markets										
MSCI EM Index	973.59	-0.80	-1.23	-0.69	-1.61	1.80				
China (SSE Composite)	3,116.72	-0.18	-0.53	-0.10	-2.67	0.89	1.36	12.00		44,025.04
India (Sensex)	66,598.91	0.50	1.85	2.73	2.91	9.46	4.32	22.98	1.21	129,524.12
Kuwait										
Kuwait All Share Index	7,009.91	0.61	0.06	0.06	-0.28	-3.87	1.48	15.70	3.24	45.49
Kuwait Premier Index	7,691.23	0.69	-0.05	-0.05	-1.51	-5.23	1.64	17.35	3.07	36.44
Kuwait Main Index	5,719.37	0.31	0.47	0.47	4.68	2.19	1.05	11.08	3.93	9.04
Kuwait Sector										
Banking	1,700.25	0.74	0.12	0.12	-0.32	-5.22	1.72	17.78	2.71	28.82
Telecom	1,118.19	0.41	1.23	1.23	0.07	-5.36	1.69	10.41	6.32	3.43
Industrials	945.17	0.69	0.48	0.48	-5.77	-12.39	1.06	16.47	2.97	3.32
Financial Services	1,270.45	0.27	0.05	0.05	3.54	1.05	1.01	14.84	3.91	4.04
Real Estate	1,210.20	0.39	-0.39	-0.39	0.22	0.12	0.94	14.90	2.08	2.60
Basic Materials	871.00	0.81	-1.08	-1.08	-4.01	0.68	1.52	9.72	8.98	0.49
Health Care	469.71	0.00	-2.70	-2.70	4.51	1.70	1.70	12.07	1.77	0.23
Consumer Staples	607.96	0.11	-0.11	-0.11	-1.16	26.67	1.39	76.84	2.03	0.18
Insurance	2,219.71	0.41	-1.43	-1.43	5.20	43.13	1.25	7.46	4.21	0.89
Consumer Discretionary	1,559.58	0.24	-2.53	-2.53	-0.03	4.89				
Energy	996.46	-0.20	0.09	0.09	-2.25	-12.48	0.79	10.12	5.09	0.21
Technology	563.08	-0.13	-3.25	-3.25	-16.69	-19.12	0.69			0.01
Utilities	505.26	0.00	-1.03	-1.03	-4.00	2.13				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Thursday as worries over demand due to a seasonal slowdown during winter and an uncertain economic outlook for China outweighed expectations of tighter supplies from extended production cuts in Saudi Arabia and Russia. Brent crude futures fell 37 cents to \$90.23 a barrel

Kuwait Market

The market closed up by + 0.61% at 7,009.91 value traded 34.0 million KD, Premier market value reached 27.0 million KD up + 0.69% at 7,691.23

KSA Market

The market closed down today by – 0.73% at 11,215.56

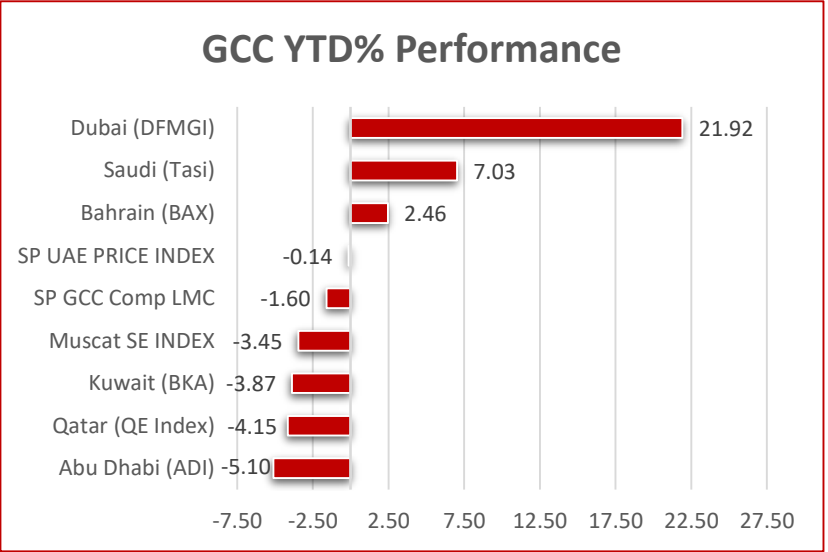


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.919	1.10	-0.11	-0.11	-1.71	-10.49	13.74	1.75	3.68	7.35
KFH	0.749	0.67	0.54	0.54	0.54	0.11	19.38	1.90	2.25	11.10
ZAIN	0.504	0.40	-1.18	-1.18	-2.70	-10.48	10.34	1.76	6.94	2.18
BOUBYAN BANK	0.615	0.82	0.82	0.82	-3.91	-18.31	40.37	2.50	0.92	2.45
AGILITY	0.576	1.23	0.17	0.17	-7.54	-20.00	21.12	0.77	0.00	1.54
Saudi Arabia										
ARAMCO	34.15	0.44	-2.15	-2.15	5.89	17.02	16.20	5.38	3.96	8,264.30
SABIC	88.90	-1.11	0.57	0.57	0.79	-0.56	68.04	1.53	4.27	266.70
STC	39.10	1.03	-1.76	-1.76	-10.11	6.83	15.59	2.56	4.09	195.50
AL-RAJHI BANK	70.80	-1.53	-1.94	-1.94	-3.01	-5.85	16.86	2.79	2.51	283.20
NCB	35.10	-0.43	-1.82	-1.82	-4.62	-6.87	11.13	1.23	3.70	210.60
Abu Dhabi										
ETISALAT.AD	19.00	1.89	-1.22	-2.42	-13.57	-15.31	16.33	3.85	4.13	168.37
FAB.AD	13.22	1.06	-1.76	-2.34	-2.05	-21.87	11.13	1.25	3.89	147.60
EMIRATES NBD	16.60	0.90	0.30	2.45	12.79	28.85	5.37	1.06	3.58	105.80
DB ISLAMIC DB	5.64	-0.35	-0.35	-0.35	2.74	-1.40	7.41	0.96	5.34	40.69
EMAR.DU	7.04	-0.57	-1.13	-0.85	9.20	19.45	7.83	0.87	3.57	61.87
Qatar										
QNB	15.180	0.53	-2.69	-2.69	-1.56	-15.67	10.12	1.35	3.95	139.56
INDUSTREIS QAT	13.520	2.97	9.39	9.39	20.39	5.54	15.21	2.12	8.14	81.80
QA ISLAMIC BK	19.050	-0.26	-1.40	-1.40	7.57	2.64	11.40	1.64	3.28	45.11
MASRAF AL RAYA	2.118	-0.14	-4.59	-4.59	-17.36	-33.21	19.02	0.82	4.72	19.76
MESAIEED PETRO	1.870	1.08	1.63	1.63	-1.58	-12.08	17.69	1.40	5.88	23.49
Oman										
BANK MUSCAT	0.281	-0.35	-1.40	-1.40	1.81	2.18	11.10	0.95	5.34	2.11
OMANTEL	1.005	0.00	-2.43	-2.43	1.31	9.24	32.50	1.20	3.23	0.75
BANK DHOFAR	0.171	0.00	-2.29	-2.29	-1.16	-2.29	19.63	0.72	2.92	0.51
NAT BANK OF OMAN	0.294	-1.01	-0.68	-0.68	5.00	1.73	10.86	0.74	2.52	0.48
OMINVEST	0.398	0.00	0.00	0.00	5.29	-5.24	5.85	0.89	3.77	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-August- 23	24.38%	14.96%	0.07%	2.17%	0.24%	5.16%	17.53%	13.56%	6.12%	4.7%
6-September-23	24.37%	14.52%	0.07%	2.21%	0.24%	5.10%	17.55%	13.48%	6.06%	4.86%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.61%. The leading sector top performance indices today are Basic Material + 0.81% , Banking + 0.74 % , Industrials + 0.69 % , Telcom & Insurance + 0.41 % respectively

KSA
Saudi Armco has a positive performance today by + 0.44%, SABIC has a negative performance today by - 1.11 % , STC has a positive performance today by + 1.03%, Al Rajhi Bank has a negative performance today by – 1.53%

U.A.E
ETISALAT .AD has a positive performance today by + 1.89 % , FAB.AD has a positive performance today by + 1.06 %



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Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw