



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, August 8th 2023



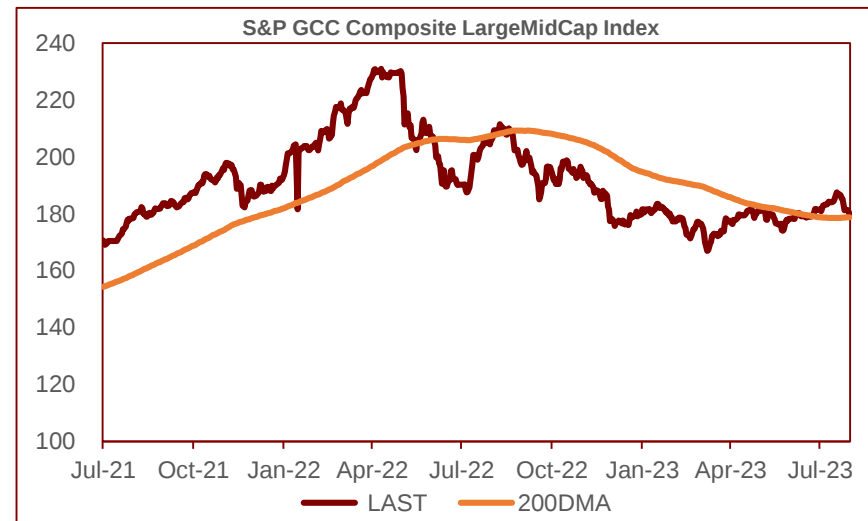


Market Watch

Tuesday, August 8, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,244.27	-0.25	-1.16	-3.83	-1.87	7.31	11,024 SAR	1.89	18.14
Qatar (QE Index)	10,686.03	-1.09	-1.05	-2.53	6.07	0.05	567 QAR	1.39	11.64
Dubai (DFMGI)	4,077.73	-0.04	0.66	0.45	7.54	22.23	583 AED	1.60	21.24
Abu Dhabi (ADI)	9,989.84	1.69	2.11	2.07	4.60	-2.17	1,435 AED	1.83	21.02
Bahrain (BAX)	1,975.59	-0.03	-0.34	-0.45	0.90	4.24	9 BHD	6.38	14.49
MUSCAT SE INDEX	4,761.52	-0.32	-0.46	-0.31	-0.14	-1.97	5 OMR	0.99	13.25
SP GCC Comp LMC	179.70	-0.53	-0.83	-3.09	0.38	0.52			
SP UAE PRICE INDEX	142.15	0.06	0.79	0.59	5.81	3.38			
Developed Markets									
MSCI World Index	2,988.10	-0.52	-0.07	-2.49	0.72	14.81			
U.S. (S&P 500)	4,499.38	-0.42	-0.06	-1.95	1.10	17.19			
U.K. (FTSE 100)	7,527.42	-0.36	-0.02	-2.23	-0.05	1.02			
Japan (Topix)	2,291.73	0.34	1.03	-1.33	0.14	21.15			
Emerging Markets									
MSCI EM Index	1,003.71	-1.24	-1.19	-4.13	1.44	4.95			
China (SSE Composite)	3,260.62	-0.25	-0.60	-0.92	1.83	5.55			
India (Sensex)	65,846.50	-0.16	0.93	-1.02	1.74	8.23			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,186.99	-0.25	0.59	-0.92	2.24	-1.44	46.38 KWD	1.73	17.32
Kuwait Premier Index	7,945.17	-0.56	0.15	-1.44	1.74	-2.10	35.97 KWD	1.66	17.00
Kuwait Main Index	5,695.68	1.00	2.35	1.17	4.25	1.77	10.41 KWD	1.97	18.48
NIC 50	9,294.93	1.96	0.14	-1.45	1.73	2.32	28.60 KWD	1.64	16.00
Kuwait Sector									
Banking	1,749.92	-0.30	0.77	-1.08	2.59	-2.45	29.41 KWD	1.15	18.00
Telecom	1,106.06	-0.14	0.14	-0.67	-1.02	-6.38	3.40 KWD	1.34	8.80
Industrials	995.64	-0.43	0.98	-0.57	-0.74	-7.72	3.52 KWD	0.84	18.19
Financial services	1,278.56	0.08	0.40	-0.91	4.20	1.70	3.66 KWD	0.75	21.06
Real estate	1,233.09	-0.79	-0.52	-1.36	2.12	2.02	2.67 KWD	0.62	22.88
Basic materials	866.54	-0.05	0.03	-1.88	-4.50	0.17	0.77 KWD	1.38	8.01
Health care	450.05	-1.26	-0.93	-0.93	0.14	-2.55	0.22 KWD	0.92	6.43
Consumer services	578.88	-2.93	-5.74	-6.88	-5.89	20.61	0.82 KWD	0.88	14.43
Insurance	2,232.44	0.66	1.05	2.45	5.80	43.95	0.91 KWD	0.89	12.10
Consumer Disc	1,735.83	1.26	0.86	0.87	11.27	16.75	0.18 KWD	1.09	0.00
Energy	1,011.55	0.00	1.45	1.26	-0.77	-11.15	0.21 KWD	0.73	4.45
Technology	592.91	0.62	-0.37	2.77	-12.27	-14.84	0.01 KWD	0.73	0.00
Utilities	513.16	-1.51	0.52	-3.47	-2.50	3.72	0.21 KWD	1.96	15.97



What Move the GCC markets

Oil Prices

Oil prices eased in Asian morning trade on Wednesday as concerns over slow demand from top crude importer China grew after bearish trade and inflation data, outweighing fears over tighter supply arising from output cuts by Saudi Arabia and Russia. Brent crude futures fell 15 cents, or 0.2%, to \$86.02 a barrel.

Kuwait Market

The market down by -0.25% at 7,186.99 value traded 50.9 million KD, Premier market value traded reached 41.8 million KD down -0.56% at 7,945.17

KSA Market

The market closed down today by -0.25% at 11,244.27

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



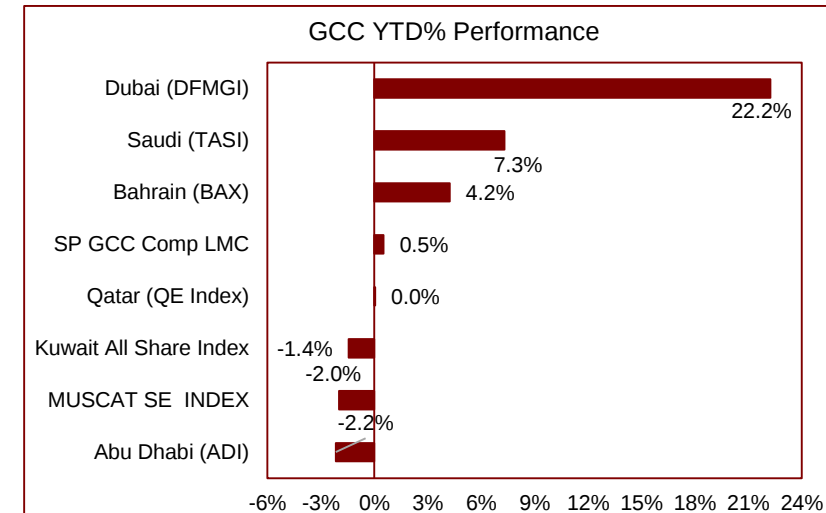
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.942	-1.26	-1.05	-2.08	0.75	-8.25	7.48 KWD	1.81	27.00
KFH	0.772	-0.52	0.26	-2.15	3.62	3.18	11.41 KWD	1.97	32.00
Zain	0.519	-0.19	0.19	-0.38	0.19	-7.82	2.25 KWD	1.75	11.06
BOUBYAN BANK	0.633	-0.63	1.28	2.10	-1.09	-15.92	2.51 KWD	2.60	34.00
Agility	0.640	0.00	1.91	1.59	2.73	-11.11	1.71 KWD	0.90	23.07
Saudi Arabia									
ARAMCO	33.05	1.23	2.48	2.01	2.48	13.26	8,004.07 SAR	5.23	15.89
SABIC	84.10	-1.06	-1.06	-1.87	-4.65	-5.93	252.49 SAR	1.35	35.00
STC	40.20	0.50	-3.13	-5.19	-7.59	9.84	201.15 SAR	2.65	16.08
AL-RAJHI BANK	71.10	0.00	-0.42	-4.69	-2.60	-5.45	284.61 SAR	2.76	16.68
NCB	35.80	-2.19	-3.89	-7.13	-2.72	-5.01	214.96 SAR	1.25	11.58
United Arab Emirates									
ETISALAT.AD	22.30	1.09	1.00	-0.45	-0.45	-2.45	206.60 AED	5.10	21.10
FAB.AD	14.48	0.28	-0.14	-1.09	6.16	-15.32	159.97 AED	1.37	12.27
EMIRATES NBD	16.70	-2.05	1.21	-1.76	12.46	28.46	105.49 AED	1.07	5.42
DB ISLAMIC BK	5.73	-0.52	-1.55	-0.35	4.75	0.53	41.49 AED	0.99	7.63
EMAAR PROPERT	7.04	-0.56	1.59	4.14	9.83	20.14	62.23 AED	0.87	7.42
Qatar									
QNB	16.85	-0.30	-0.88	-0.77	9.27	-6.39	155.72 QAR	1.51	11.29
INDUSTRIES QAT	13.03	-3.48	-4.75	-2.25	16.03	1.72	78.87 QAR	2.16	10.83
QA ISLAMIC BK	20.03	-1.77	1.68	-5.30	13.10	7.92	47.36 QAR	1.72	11.96
MASRAF AL RAYA	2.49	-0.99	-0.44	-0.84	-2.89	-21.51	23.16 QAR	0.97	22.32
MESAIEED PETRO	1.92	-1.54	-2.54	-1.54	1.05	-9.73	24.13 QAR	1.48	15.14
OMAN									
BANK MUSCAT	0.281	0.36	0.36	0.36	1.81	2.18	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	0.175	-1.69	0.00	0.57	1.16	0.00	0.52 QAR	0.73	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	0.380	0.26	0.80	-2.31	0.53	-9.52	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 -0.25 %The leading sector bottom performance indices today are Consumer services -2.93 % Utilities -1.51 % Health care -1.26 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.23 %, SABIC have negative performance today by -1.058%. STC has a positive performance today by + 0.5 %, Al Rajhi Bank flat performance today 0 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.09 %, FAB.AD has a positive performance today by + 0.28 %



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