

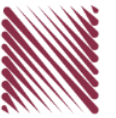


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 9th 2023



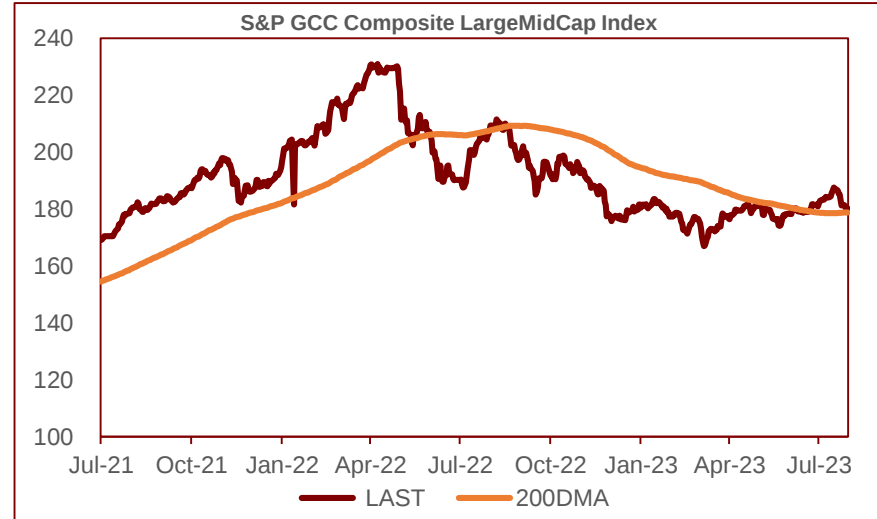


Market Watch

Wednesday, August 9, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,286.21	0.37	-0.79	-3.47	-1.51	7.71	11,047 SAR	1.97	18.30
Qatar (QE Index)	10,716.45	0.28	-0.76	-2.25	6.37	0.33	567 QAR	1.39	12.74
Dubai (DFMGI)	4,070.54	-0.18	0.48	0.28	7.35	22.02	582 AED	1.60	21.20
Abu Dhabi (ADI)	9,953.19	-0.37	1.73	1.70	4.22	-2.53	1,435 AED	1.85	21.21
Bahrain (BAX)	1,974.43	-0.06	-0.40	-0.51	0.85	4.18	9 BHD	6.37	14.27
MUSCAT SE INDEX	4,773.99	0.26	-0.20	-0.04	0.12	-1.72	5 OMR	0.99	13.25
SP GCC Comp LMC	180.21	0.28	-0.55	-2.81	0.67	0.80			
SP UAE PRICE INDEX	142.25	0.07	0.86	0.66	5.88	3.46			
Developed Markets									
MSCI World Index	2,976.31	-0.39	-0.46	-2.87	0.32	14.36			
U.S. (S&P 500)	4,467.71	-0.70	-0.76	-2.64	0.39	16.36			
U.K. (FTSE 100)	7,587.30	0.80	0.77	-1.46	0.74	1.82			
Japan (Topix)	2,282.57	-0.40	0.63	-1.72	-0.26	20.66			
Emerging Markets									
MSCI EM Index	1,008.42	0.47	-0.73	-3.68	1.91	5.44			
China (SSE Composite)	3,244.49	-0.49	-1.10	-1.41	1.32	5.02			
India (Sensex)	65,995.81	0.23	1.16	-0.80	1.97	8.47			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,182.35	-0.06	0.52	-0.98	2.17	-1.51	46.32 KWD	1.73	17.92
Kuwait Premier Index	7,916.15	-0.37	-0.22	-1.80	1.37	-2.46	35.81 KWD	1.66	17.25
Kuwait Main Index	5,759.64	1.12	3.50	2.30	5.42	2.91	10.51 KWD	1.97	20.29
NIC 50	9,294.93	1.96	-0.23	-1.81	1.36	2.32	28.60 KWD	1.64	16.25
Kuwait Sector									
Banking	1,752.36	0.14	0.91	-0.94	2.73	-2.32	29.43 KWD	1.14	18.25
Telecom	1,102.08	-0.36	-0.22	-1.02	-1.37	-6.72	3.38 KWD	1.34	8.76
Industrials	993.90	-0.17	0.81	-0.75	-0.91	-7.88	3.51 KWD	0.84	18.31
Financial services	1,276.52	-0.16	0.24	-1.07	4.04	1.53	3.66 KWD	0.76	21.06
Real estate	1,225.27	-0.63	-1.15	-1.98	1.47	1.37	2.65 KWD	0.62	29.84
Basic materials	857.14	-1.08	-1.05	-2.94	-5.54	-0.92	0.76 KWD	1.37	8.01
Health care	455.79	1.28	0.33	0.33	1.41	-1.31	0.23 KWD	0.96	6.69
Consumer services	581.61	0.47	-5.30	-6.44	-5.44	21.18	0.80 KWD	0.87	14.10
Insurance	2,205.49	-1.21	-0.17	1.21	4.53	42.21	0.90 KWD	0.87	12.10
Consumer Disc	1,720.86	-0.86	-0.01	0.00	10.31	15.74	0.18 KWD	1.10	36.43
Energy	1,010.85	-0.07	1.38	1.19	-0.84	-11.21	0.21 KWD	0.72	4.45
Technology	592.91	0.00	-0.37	2.77	-12.27	-14.84	0.01 KWD	0.73	0.00
Utilities	513.16	0.00	0.52	-3.47	-2.50	3.72	0.21 KWD	1.96	15.97



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Thursday after reaching fresh highs in the previous session as concerns about the Chinese economy offset the positive impact of steep drawdowns in U.S. fuel stockpiles and Saudi and Russian output cuts. Brent crude fell 20 cents, or 0.2%, to \$87.35

Kuwait Market

The market down by -0.06% at 7,182.35 value traded 42.7 million KD, Premier market value traded reached 34.8 million KD down -0.37% at 7,916.15

KSA Market

The market closed up today by 0.37% at 11,286.21

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	0.937	-0.53	-1.58	-2.60	0.21	-8.73	7.43 KWD	1.80	27.00
KFH	0.770	-0.26	0.00	-2.41	3.36	2.92	11.37 KWD	1.97	32.00
Zain	0.517	-0.39	-0.19	-0.77	-0.19	-8.17	2.24 KWD	1.74	11.02
BOUBYAN BANK	0.632	-0.16	1.12	1.94	-1.25	-16.05	2.50 KWD	2.59	34.00
Agility	0.637	-0.47	1.43	1.11	2.25	-11.53	1.70 KWD	0.89	22.96
Saudi Arabia									
ARAMCO	33.15	0.30	2.79	2.31	2.79	13.60	8,020.38 SAR	5.25	16.08
SABIC	86.10	2.38	1.29	0.47	-2.38	-3.69	258.24 SAR	1.38	35.00
STC	40.55	0.87	-2.29	-4.36	-6.78	10.79	202.70 SAR	2.68	16.16
AL-RAJHI BANK	72.10	1.41	0.98	-3.35	-1.23	-4.12	288.33 SAR	2.79	16.68
NCB	35.65	-0.42	-4.30	-7.52	-3.13	-5.41	213.85 SAR	1.25	11.33
United Arab Emirates									
ETISALAT.AD	22.30	0.00	1.00	-0.45	-0.45	-2.45	206.60 AED	5.10	21.10
FAB.AD	14.54	0.41	0.28	-0.68	6.60	-14.97	160.61 AED	1.38	12.32
EMIRATES NBD	16.60	-0.60	0.61	-2.35	11.78	27.69	104.84 AED	1.07	5.39
DB ISLAMIC BK	5.72	-0.17	-1.72	-0.52	4.57	0.35	41.41 AED	0.99	7.61
EMAAR PROPERT	7.00	-0.57	1.01	3.55	9.20	19.45	61.86 AED	0.87	7.38
Qatar									
QNB	16.75	-0.59	-1.47	-1.35	8.63	-6.94	154.63 QAR	1.50	11.22
INDUSTRIES QAT	13.17	1.07	-3.73	-1.20	17.28	2.81	79.63 QAR	2.13	14.57
QA ISLAMIC BK	20.17	0.70	2.39	-4.63	13.89	8.67	47.63 QAR	1.73	12.04
MASRAF AL RAYA	2.48	-0.28	-0.72	-1.12	-3.16	-21.73	23.07 QAR	0.96	22.26
MESAIEED PETRO	1.94	1.15	-1.42	-0.41	2.21	-8.70	24.38 QAR	1.50	15.32
OMAN									
BANK MUSCAT	0.281	0.00	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.010	13.74	1.10	1.51	1.81	9.78	0.76 OMR	1.24	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.299	1.70	1.01	3.46	6.79	3.46	0.49 QAR	0.75	12.71
OMINVEST	0.380	0.00	0.80	-2.31	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding

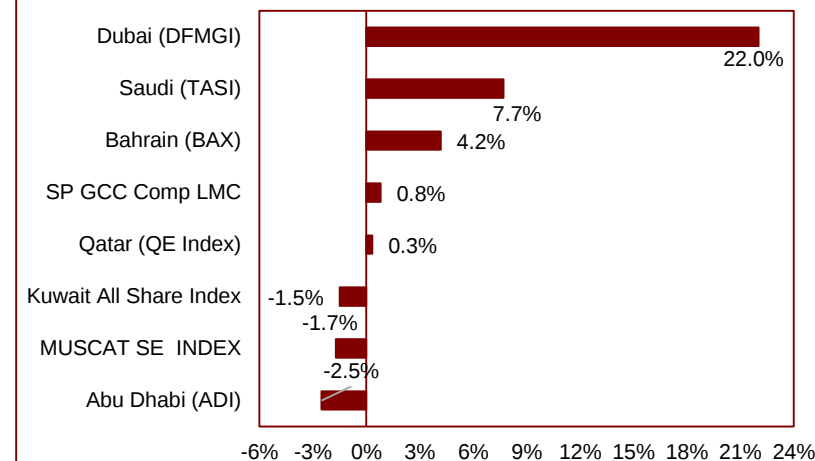
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-July 23	24.37%	15.18%	0.07%	1.78%	0.24%	5.10%	17.58%	13.78%	6.19%	4.59%
2-August 23	24.38%	15.05%	0.07%	1.93%	0.24%	5.03%	17.57%	13.73%	6.14%	4.56%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by -0.06 %The leading sector bottom performance indices today are Insurance -1.21 % Basic materials -1.08 % Consumer Disc -0.86 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.3 %, SABIC have positive performance today by + 2.37%. STC has a positive performance today by + 0.87 %, Al Rajhi Bank has a positive performance today by + 1.41 %

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD has a positive performance today by + 0.41 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

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