

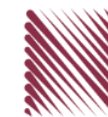


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , July 9th 2023



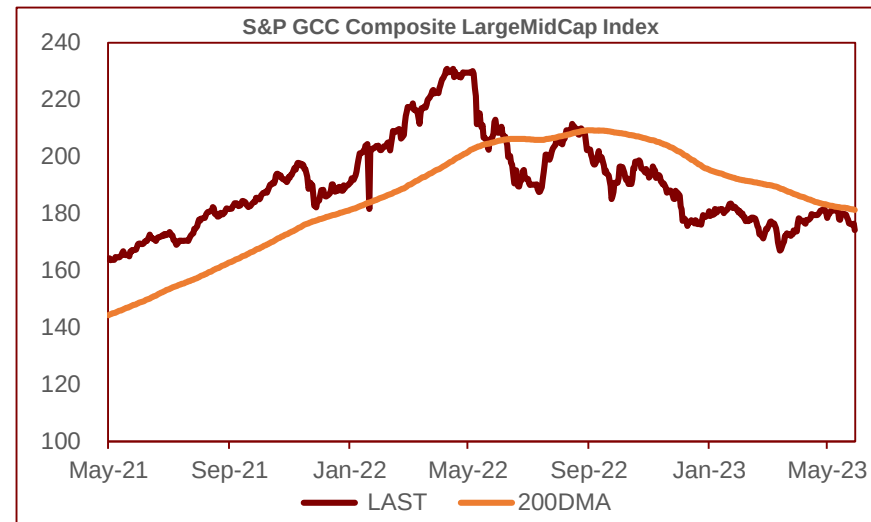


Market Watch

Sunday, July 9, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,609.35	0.10	1.31	1.31	9.62	10.79	10,971 SAR	2.14	18.59
Qatar (QE Index)	10,270.89	0.25	1.63	1.95	0.57	-3.84	548 QAR	1.41	11.29
Dubai (DFMGI)	3,962.42	0.00	4.93	4.49	16.31	18.78	574 AED	1.55	22.48
Abu Dhabi (ADI)	9,604.15	0.00	0.80	0.56	1.84	-5.94	1,435 AED	1.83	21.24
Bahrain (BAX)	1,954.44	-0.25	-0.36	-0.18	3.60	3.12	9 BHD	7.20	18.00
MUSCAT SE INDEX	4,788.72	-0.03	1.22	0.43	-1.53	-1.41	5 OMR	1.02	13.25
SP GCC Comp LMC	181.62	0.12	1.41	1.45	4.57	1.59			
SP UAE PRICE INDEX	137.33	-0.19	2.47	2.22	7.31	-0.12			
Developed Markets									
MSCI World Index	2,924.19	-0.01	-0.21	-1.43	4.76	12.35			
U.S. (S&P 500)	4,398.95	-0.29	0.39	-1.16	7.05	14.57			
U.K. (FTSE 100)	7,256.94	-0.32	-3.27	-3.65	-4.91	-2.61			
Japan (Topix)	2,254.90	-0.97	-1.81	-1.47	12.55	19.20			
Emerging Markets									
MSCI EM Index	980.66	-0.41	-2.05	-0.89	-0.97	2.54			
China (SSE Composite)	3,196.61	-0.28	-0.04	-0.17	-2.33	3.47			
India (Sensex)	65,280.45	-0.77	3.23	0.87	10.66	7.30			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,200.76	0.26	2.15	2.43	2.13	-1.25	46.42 KWD	1.78	18.67
Kuwait Premier Index	8,020.17	0.37	2.36	2.70	2.54	-1.18	36.29 KWD	1.71	18.53
Kuwait Main Index	5,537.41	-0.21	1.30	1.35	0.67	-1.06	10.13 KWD	2.03	19.18
NIC 50	9,116.27	0.00	2.35	2.69	2.53	0.36	28.60 KWD	1.69	17.53
Kuwait Sector									
Banking	1,750.56	0.22	2.26	2.63	-0.13	-2.42	29.38 KWD	1.23	19.53
Telecom	1,133.96	0.78	2.17	1.48	0.15	-4.02	3.48 KWD	1.40	9.08
Industrials	1,020.89	0.41	0.97	1.78	3.44	-5.38	3.60 KWD	0.87	21.33
Financial services	1,251.18	-0.53	1.58	1.97	4.62	-0.48	3.60 KWD	0.76	19.84
Real estate	1,241.21	0.47	2.90	2.79	14.91	2.69	2.68 KWD	0.61	22.52
Basic materials	896.48	-1.66	-1.98	-1.20	4.59	3.63	0.79 KWD	1.42	8.49
Health care	453.07	-0.13	0.40	0.81	-0.53	-1.90	0.22 KWD	0.94	6.57
Consumer services	616.95	-0.20	1.72	0.30	38.55	28.54	0.85 KWD	0.87	14.31
Insurance	2,094.17	-0.02	-1.35	-0.75	9.64	35.04	0.86 KWD	0.79	10.19
Consumer Disc	1,711.15	2.68	9.52	9.68	17.04	15.09	0.19 KWD	1.12	0.00
Energy	1,031.82	1.74	0.53	1.22	3.40	-9.37	0.22 KWD	0.78	4.63
Technology	667.84	0.00	5.52	-1.19	5.03	-4.08	0.01 KWD	0.83	0.00
Utilities	528.95	-1.47	1.01	0.50	13.56	6.91	0.22 KWD	2.02	16.46



What Move the GCC markets

Oil Prices

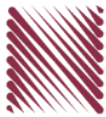
Oil prices dipped in early Asian trade on Monday as investors tread cautiously ahead of fresh economic data from top consumers the United States and China this week, while expected crude supply cuts from Saudi Arabia and Russia supported the market. Brent crude futures fell 22 cents, or 0.3%, to \$78.25 a barrel.

Kuwait Market

The market closed up today by + 0.26% at 7,200.76 value traded 31.3 million KD, Premier market value traded reached 23.9 million KD up + 0.37% at 8,020.17.

KSA Market

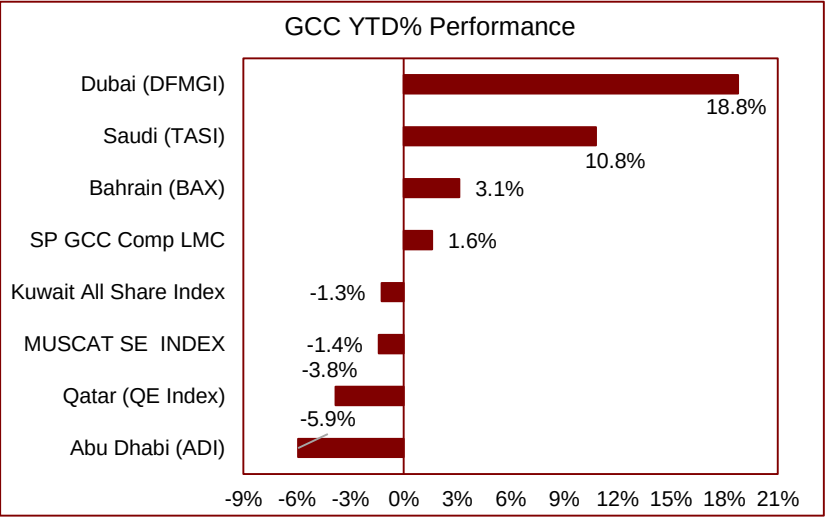
The market closed up today by + 0.10% at 11,609.35.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.957	0.00	1.70	2.35	-4.84	-6.79	7.59 KWD	1.92	27.00
KFH	0.768	0.39	2.54	3.09	2.28	2.65	11.34 KWD	1.95	32.00
Zain	0.529	1.15	2.12	2.12	-2.04	-6.04	2.29 KWD	1.78	11.28
BOUBYAN BANK	0.655	0.15	2.66	2.34	7.98	-12.99	2.60 KWD	2.92	34.00
Agility	0.635	0.63	1.11	1.93	2.25	-11.81	1.70 KWD	0.89	22.89
Saudi Arabia									
ARAMCO	32.30	0.00	0.16	0.16	10.00	10.69	7,816.60 SAR	5.24	13.90
SABIC	89.30	0.79	1.25	1.25	-1.11	-0.11	267.90 SAR	1.43	35.00
STC	44.60	0.68	2.53	2.53	11.36	21.86	223.00 SAR	2.98	18.07
AL-RAJHI BANK	72.50	0.00	-0.68	-0.68	-1.36	-3.59	290.00 SAR	2.92	16.90
NCB	36.75	-0.27	-0.14	-0.14	7.40	-2.49	220.50 SAR	1.28	11.89
United Arab Emirates									
ETISALAT.AD	22.10	-0.45	-0.72	-1.34	0.18	-3.32	206.60 AED	5.10	21.10
FAB.AD	13.74	-0.29	1.33	0.73	6.68	-19.65	151.79 AED	1.35	12.94
EMIRATES NBD	15.95	-1.24	7.77	7.41	21.29	22.69	100.75 AED	1.05	6.03
DB ISLAMIC BK	5.50	-0.54	0.92	0.55	5.16	-3.51	39.82 AED	0.99	7.65
EMAAR PROPERT	6.88	1.33	5.20	7.33	22.86	17.41	60.81 AED	0.85	7.25
Qatar									
QNB	16.17	-0.19	3.65	4.86	0.62	-10.17	149.46 QAR	1.47	10.68
INDUSTRIES QAT	11.73	0.26	4.17	4.45	-9.77	-8.43	71.02 QAR	1.94	9.75
QA ISLAMIC BK	17.90	0.00	2.52	1.07	0.67	-3.56	42.33 QAR	1.59	10.94
MASRAF AL RAYA	2.53	0.12	-0.74	-1.13	-14.25	-20.09	23.58 QAR	1.00	19.27
MESAIEED PETRO	1.92	-0.10	-0.57	0.95	-0.10	-9.83	24.11 QAR	1.48	15.13
OMAN									
BANK MUSCAT	0.279	-0.36	1.45	1.09	1.45	1.45	2.09 OMR	0.96	8.33
OMANTEL	0.990	11.49	1.02	-0.20	-10.00	7.61	0.74 OMR	1.22	7.69
BANK DHOFAR	0.173	0.00	0.00	0.00	8.12	-1.14	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.286	0.35	2.14	2.14	6.72	-1.04	0.46 QAR	0.72	12.71
OMINVEST	0.378	-1.56	1.07	0.00	-23.79	-10.00	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
28-June 23	24.31%	15.55%	0.06%	1.58%	0.24%	5.23%	17.63%	13.91%	6.22%	4.58%
05-July 23	24.3%	15.55%	0.066%	1.72%	0.24%	5.22%	17.6%	13.9%	6.23%	4.48%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.26 %The leading sector best performance indices today are Consumer Disc 2.68 % Energy 1.74 % Telecom 0.78 % respectively.

KSA
Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.79%. STC has a positive performance today by + 0.68 %, Al Rajhi Bank flat performance today 0 %

U.A.E
ETISALAT .AD have negative performance today by -0.45 %, FAB.AD have negative performance today by -0.29 %



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