



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , October 11th 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

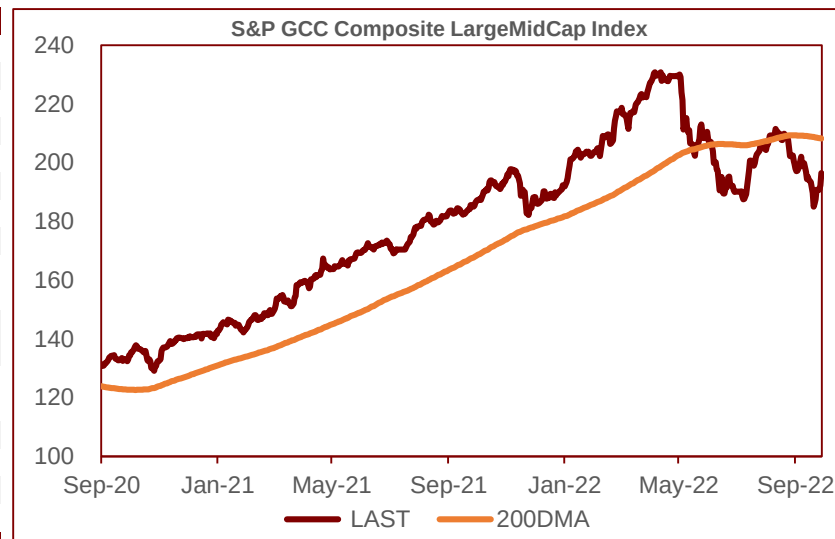


Market Watch

Tuesday, October 11, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,514.26	-0.14	-2.07	0.96	0.96	2.06	10,841 SAR	1.91	17.37
Qatar (QE Index)	12,754.52	-1.23	-2.10	0.47	0.47	9.71	643 QAR	1.51	14.32
Dubai (DFMGI)	3,320.12	-0.57	-0.93	-0.57	-0.57	3.89	452 AED	1.34	13.46
Abu Dhabi (ADI)	9,754.17	-0.78	-1.39	0.03	0.03	14.91	1,435 AED	2.16	23.90
Bahrain (BAX)	1,878.51	-0.05	-0.24	-0.18	-0.18	4.52	19 BHD	1.71	11.45
MUSCAT SE INDEX	4,520.19	-0.25	-0.81	-0.18	-0.18	9.46	5 OMR	0.94	13.25
SP GCC Comp LMC	191.71	-0.50	-2.32	0.53	0.53	1.03			
SP UAE PRICE INDEX	138.18	-1.17	-1.82	-0.39	-0.39	-6.30			
Developed Markets									
MSCI World Index	2,376.29	-0.81	-4.12	-0.10	-0.10	-26.47			
U.K. (FTSE 100)	6,885.23	-1.06	-1.60	-0.12	-0.12	-6.76			
Japan (Topix)	1,871.24	-1.86	-2.66	1.92	1.92	-6.08			
Emerging Markets									
MSCI EM Index	864.66	-2.28	-5.04	-1.27	-1.27	-29.82			
China (SSE Composite)	2,979.79	0.19	-1.47	-1.47	-1.47	-18.13			
India (Sensex)	57,147.32	-1.46	-1.85	-0.49	-0.49	-1.90			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,045.48	0.61	-1.88	-0.85	-0.85	0.03	45.19 KWD	2.26	21.46
Kuwait Premier Index	7,894.62	0.81	-1.81	-0.69	-0.69	3.34	35.74 KWD	2.42	22.95
Kuwait Main Index	5,259.81	-0.23	-2.15	-1.47	-1.47	-10.64	9.45 KWD	1.65	15.81
NIC 50	8,840.53	0.82	-1.82	-0.70	-0.70	3.73	28.60 KWD	2.40	21.95
Kuwait Sector									
Banking	1,729.52	0.71	-2.08	-0.79	-0.79	6.58	29.03 KWD	1.22	23.95
Telecom	1,157.97	0.01	-1.97	-0.47	-0.47	6.30	3.55 KWD	0.82	12.86
Industrials	1,017.85	1.90	-0.61	0.12	0.12	-10.83	3.59 KWD	0.76	10.79
Financial services	1,212.50	0.23	-2.45	-3.29	-3.29	-14.81	3.17 KWD	0.62	12.48
Real estate	1,193.96	0.25	-1.58	-0.68	-0.68	-9.99	2.57 KWD	0.61	25.99
Basic materials	867.31	-0.49	-2.39	-3.78	-3.78	-15.37	0.77 KWD	1.31	9.47
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	463.21	0.44	-3.03	-0.88	-0.88	-36.64	0.72 KWD	0.91	10.08
Insurance	1,568.36	0.58	0.41	4.48	4.48	2.28	0.65 KWD	0.82	8.02
Consumer Disc	1,399.00	-1.33	-0.40	1.00	1.00	4.67	0.14 KWD	0.91	19.05
Energy	1,031.21	-0.76	-1.05	-3.40	-3.40	-27.79	0.21 KWD	0.75	11.28
Technology	567.45	0.00	-1.26	-3.70	-3.70	-17.02	0.01 KWD	0.69	0.00
Utilities	505.26	1.05	-0.52	-1.54	-1.54	-15.79	0.21 KWD	2.16	14.70



What Move the GCC markets

Oil Prices

Oil prices fell for a third straight session on Wednesday as investors fretted about a hit to fuel demand from growing risks of a global recession and tightening Covid-19 curbs in China.

Brent crude futures fell 51 cents, or 0.5%, to \$93.78 a barrel by 0033 GMT. U.S. West Texas Intermediate crude was at \$88.66 a barrel, down 69 cents, or 0.8%.

Kuwait Market

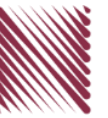
The market closed up today by +.61% at 7,045.48 value traded 52.2 million KD, Premier market value traded reached 45.3 million KD and closed at 7,894.62 up by +0.81%.

KSA Market

The market closed down today by - 0.14% at 11,514.26 , mainly due decreasing oil prices and negative performance in international equities Markets.

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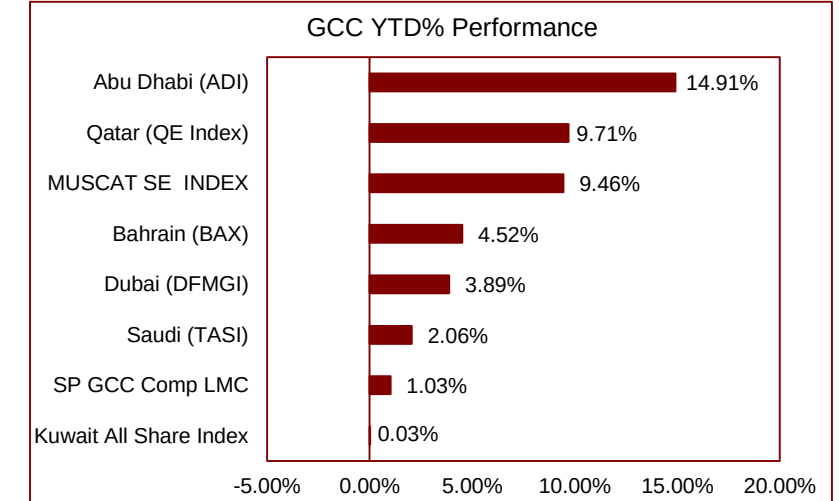
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.023	0.29	-0.29	4.82	4.82	7.74	7.72 KWD	1.98	27.00
KFH	0.786	1.42	-4.61	-6.54	-6.54	3.92	10.45 KWD	3.37	32.00
Zain	0.587	0.34	-0.51	0.34	0.34	-1.34	2.54 KWD	2.14	12.86
BOUBYAN BANK	0.805	1.00	-0.37	5.23	5.23	13.00	3.01 KWD	3.25	34.00
Agility	0.677	3.52	0.00	1.35	1.35	-14.03	1.81 KWD	1.16	2.14
Saudi Arabia									
ARAMCO	35.70	-0.14	-0.83	-0.42	-0.42	9.69	7,851.91 SAR	6.03	14.87
SABIC	91.40	-0.65	-3.48	2.93	2.93	-21.21	274.13 SAR	1.52	35.00
STC	37.80	-0.92	-3.82	-3.94	-3.94	-15.93	188.95 SAR	2.63	16.69
AL-RAJHI BANK	81.90	-0.73	-2.73	0.74	0.74	-7.59	327.51 SAR	4.00	22.53
NCB	61.30	-2.54	-5.40	-2.85	-2.85	-4.81	274.43 SAR	1.69	15.98
United Arab Emirates									
ETISALAT.AD	23.82	-1.57	-0.42	1.97	1.97	-24.86	207.15 AED	4.39	22.13
FAB.AD	17.44	-1.36	-3.11	-2.35	-2.35	-6.35	192.66 AED	1.73	12.97
EMIRATES NBD	13.10	-0.38	0.77	1.95	1.95	-3.32	82.74 AED	0.97	8.88
DB ISLAMIC BK	6.00	0.17	0.84	0.33	0.33	11.52	43.44 AED	1.10	9.07
EMAAR PROPERT	5.68	-2.24	-4.70	-1.90	-1.90	16.16	46.46 AED	0.73	6.29
Qatar									
QNB	19.60	-2.15	-4.39	-1.51	-1.51	-2.92	181.03 QAR	1.73	14.04
INDUSTRIES QAT	17.10	-2.68	-3.06	1.18	1.18	10.39	103.46 QAR	2.66	10.36
QA ISLAMIC BK	24.98	-0.68	-1.03	1.13	1.13	36.28	59.03 QAR	2.34	16.49
MASRAF AL RAYA	4.02	-1.71	-3.34	-2.38	-2.38	-13.32	37.40 QAR	1.57	20.12
MESAIEED PETRO	2.41	-2.03	-0.41	2.55	2.55	15.31	30.28 QAR	1.81	15.21
OMAN									
BANK MUSCAT	0.578	-0.34	-1.70	0.70	0.70	25.39	2.17 OMR	1.02	8.33
OMANTEL	0.864	-2.70	-0.92	-1.82	-1.82	14.89	0.65 OMR	1.12	7.69
BANK DHOFAR	0.145	0.00	-0.68	2.11	2.11	15.08	0.43 QAR	0.62	14.93
NAT BANK OF OMAN	0.263	-0.75	-0.75	-2.59	-2.59	33.50	0.43 QAR	0.76	12.71
OMINVEST	0.336	0.00	0.00	1.20	1.20	9.80	0.22 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
28-Sept 22	23.67%	16.45%	0.06%	1.21%	0.37%	5.82%	17.76%	11.72%	5.66%	4.03%
5-Oct 22	23.66%	16.51%	0.06%	1.20%	0.37%	5.81%	17.77%	11.58%	5.65%	4.13%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.61 %The leading sector best performance indices today are Industrials 1.9 % Utilities 1.05 % Banking 0.71 % respectively

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC have negative performance today by -0.65%. STC have negative performance today by -0.92 %, Al Rajhi Bank have negative performance today by -0.73 %

U.A.E

ETISALAT .AD have negative performance today by -1.57 %, FAB.AD have negative performance today by -1.36 %



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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