



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Thursday , October 13<sup>th</sup> 2022

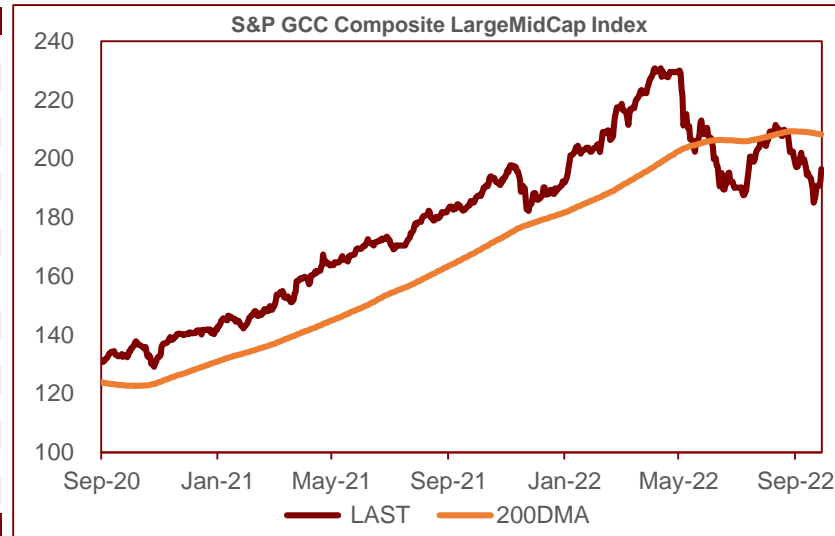




### Market Watch

Thursday, October 13, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,421.78	-1.12	-2.86	0.14	0.14	1.24	10,757 SAR	1.89	17.49
Qatar (QE Index)	12,718.25	-1.03	-2.38	0.18	0.18	9.40	643 QAR	1.52	14.11
Dubai (DFMGI)	3,376.57	0.73	-0.05	0.31	0.31	4.81	456 AED	1.35	13.57
Abu Dhabi (ADI)	9,776.05	-0.38	-1.97	-0.55	-0.55	14.24	1,435 AED	2.15	23.21
Bahrain (BAX)	1,867.59	-0.40	-0.82	-0.77	-0.77	3.91	19 BHD	1.70	11.45
MUSCAT SE INDEX	4,541.35	-0.05	-0.35	0.29	0.29	9.97	5 OMR	0.94	13.25
SP GCC Comp LMC	190.76	-1.02	-2.98	-0.14	-0.14	0.35			
SP UAE PRICE INDEX	138.95	-0.36	-2.32	-0.90	-0.90	-6.78			
<b>Developed Markets</b>									
MSCI World Index	2,376.64	1.86	-2.69	1.39	1.39	-25.37			
U.K. (FTSE 100)	6,858.79	0.35	-2.10	-0.63	-0.63	-7.23			
Japan (Topix)	1,898.19	-0.77	-3.53	1.02	1.02	-6.91			
<b>Emerging Markets</b>									
MSCI EM Index	863.33	-1.25	-6.15	-2.43	-2.43	-30.64			
China (SSE Composite)	3,071.99	-0.30	-0.27	-0.27	-0.27	-17.13			
India (Sensex)	57,919.97	-0.68	-1.69	-0.33	-0.33	-1.75			
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	6,987.23	-0.39	-2.69	-1.67	-1.67	-0.79	44.85 KWD	2.24	21.24
Kuwait Premier Index	7,827.21	-0.30	-2.65	-1.54	-1.54	2.46	35.45 KWD	2.39	22.71
Kuwait Main Index	5,222.22	-0.74	-2.85	-2.18	-2.18	-11.28	9.39 KWD	1.65	15.65
NIC 50	8,762.77	-0.33	-2.66	-1.55	-1.55	2.82	28.60 KWD	2.37	21.71
<b>Kuwait Sector</b>									
Banking	1,714.01	-0.45	-2.96	-1.68	-1.68	5.62	28.79 KWD	1.22	23.71
Telecom	1,142.65	-0.12	-3.27	-1.78	-1.78	4.89	3.50 KWD	0.79	12.57
Industrials	1,010.08	-0.39	-1.37	-0.64	-0.64	-11.51	3.57 KWD	0.80	10.83
Financial services	1,216.51	0.32	-2.13	-2.97	-2.97	-14.53	3.17 KWD	0.60	12.87
Real estate	1,176.94	-1.09	-2.98	-2.10	-2.10	-11.27	2.53 KWD	0.58	25.57
Basic materials	849.36	-0.80	-4.41	-5.77	-5.77	-17.12	0.76 KWD	1.31	9.18
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	455.68	-1.48	-4.60	-2.49	-2.49	-37.67	0.72 KWD	0.92	10.12
Insurance	1,574.36	-0.16	0.80	4.88	4.88	2.67	0.65 KWD	0.83	8.02
Consumer Disc	1,404.82	0.36	0.01	1.42	1.42	5.10	0.14 KWD	0.90	18.64
Energy	1,022.07	-1.91	-1.93	-4.26	-4.26	-28.43	0.21 KWD	0.76	11.08
Technology	567.45	5.26	-1.26	-3.70	-3.70	-17.02	0.01 KWD	0.69	0.00
Utilities	500.00	-0.52	-1.55	-2.56	-2.56	-16.67	0.21 KWD	2.14	14.55



### What Move the GCC markets

#### Oil Prices

Oil prices struggled to find their footing in early Asian trade on Thursday after a weakening global demand outlook depressed the market in the last session. Brent crude futures traded at \$94.57 per barrel.

#### Kuwait Market

The market closed down today by - 0.39% at 6,987.23 value traded 37.9 million KD, Premier market value traded reached 32.9 million KD and closed at 7,827.21 down by - 0.30%.

#### KSA Market

The market closed down today by - 1.12% at 11,421.78.



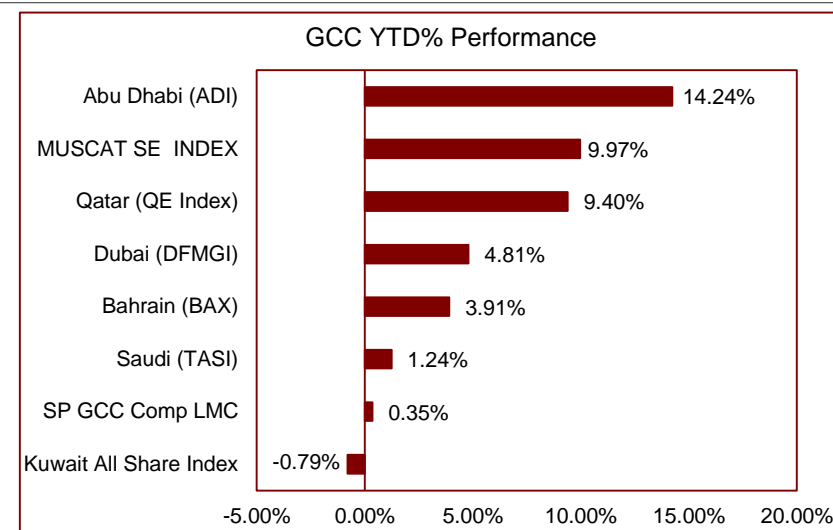
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.020	0.10	-0.58	4.51	4.51	7.42	7.70 KWD	1.98	27.00
KFH	0.772	-0.77	-6.31	-8.20	-8.20	2.07	10.27 KWD	3.31	32.00
Zain	0.580	0.00	-1.69	-0.85	-0.85	-2.52	2.51 KWD	2.11	12.71
BOUBYAN BANK	0.796	-1.12	-1.49	4.05	4.05	11.74	2.97 KWD	3.21	34.00
Agility	0.669	-0.30	-1.18	0.15	0.15	-15.05	1.79 KWD	1.14	2.12
<b>Saudi Arabia</b>									
ARAMCO	35.40	-0.84	-1.67	-1.26	-1.26	8.77	7,786.96 SAR	5.98	14.85
SABIC	90.00	-1.32	-4.96	1.35	1.35	-22.41	269.96 SAR	1.49	35.00
STC	37.95	0.40	-3.44	-3.56	-3.56	-15.59	189.72 SAR	2.64	16.54
AL-RAJHI BANK	81.30	-1.22	-3.44	0.00	0.00	-8.27	325.16 SAR	3.97	22.47
NCB	61.00	-2.24	-5.86	-3.33	-3.33	-5.28	273.12 SAR	1.68	15.85
<b>United Arab Emirates</b>									
ETISALAT.AD	23.18	-2.03	-3.09	-0.77	-0.77	-26.88	206.97 AED	4.39	21.53
FAB.AD	17.22	-1.26	-4.33	-3.58	-3.58	-7.53	191.33 AED	1.72	12.80
EMIRATES NBD	12.85	-1.15	-1.15	0.00	0.00	-5.17	81.80 AED	0.96	8.72
DB ISLAMIC BK	6.00	0.00	0.84	0.33	0.33	11.52	43.59 AED	1.11	9.07
EMAAR PROPERT	5.95	4.39	-0.17	2.76	2.76	21.68	49.89 AED	0.78	6.59
<b>Qatar</b>									
QNB	19.60	-2.00	-4.39	-1.51	-1.51	-2.92	181.03 QAR	1.73	14.04
INDUSTRIES QAT	17.11	-1.67	-3.00	1.24	1.24	10.46	103.52 QAR	2.66	10.37
QA ISLAMIC BK	24.50	-1.21	-2.93	-0.81	-0.81	33.66	57.89 QAR	2.29	16.17
MASRAF AL RAYA	4.00	-1.23	-3.87	-2.91	-2.91	-13.79	37.20 QAR	1.56	20.01
MESAIEED PETRO	2.40	-2.24	-0.66	2.30	2.30	15.02	30.20 QAR	1.81	15.18
<b>OMAN</b>									
BANK MUSCAT	0.578	-0.34	-1.70	0.70	0.70	25.39	2.17 OMR	1.02	8.33
OMANTEL	0.880	-0.90	0.92	0.00	0.00	17.02	0.66 OMR	1.14	7.69
BANK DHOFAR	0.150	0.00	2.74	5.63	5.63	19.05	0.45 QAR	0.64	14.93
NAT BANK OF OMAN	0.264	-0.38	-0.38	-2.22	-2.22	34.01	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 down today by -0.39 % The leading sector bottom performance indices today are Energy -1.91 % Consumer services -1.48 % Real estate -1.09 % respectively

#### KSA

Saudi Armco has a negative performance today by -0.84 %, SABIC has a negative performance today by -1.32 %, STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a negative performance today by -1.22 %

#### U.A.E

ETISALAT .AD have negative performance today by -2.03 %, FAB.AD have negative performance today by -1.26 %



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