



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , October 16th 2022

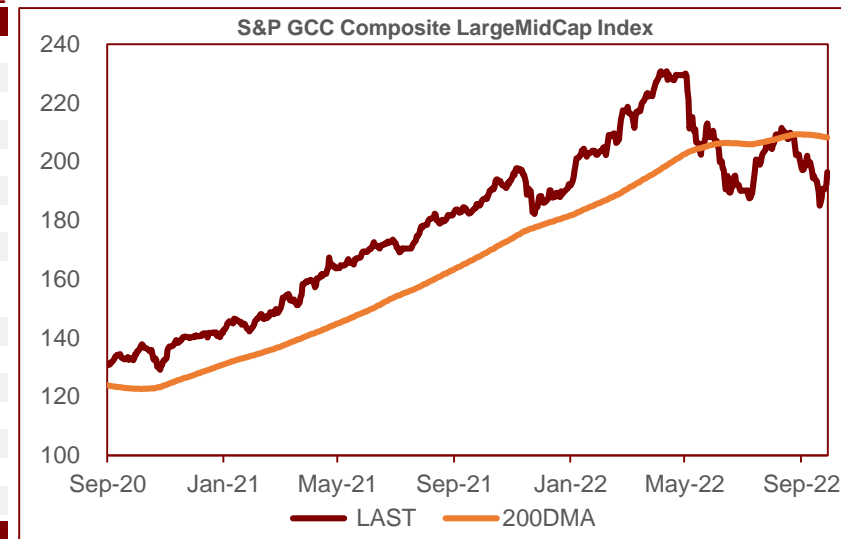




Market Watch

Sunday, October 16, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,405.88	-0.14	-2.99	0.00	0.00	1.10	10,670 SAR	1.88	17.33
Qatar (QE Index)	12,635.04	-0.65	-3.02	-0.47	-0.47	8.68	639 QAR	1.52	14.15
Dubai (DFMGI)	3,376.57	0.81	0.76	1.12	1.12	5.65	456 AED	1.35	13.60
Abu Dhabi (ADI)	9,776.05	0.82	-1.17	0.26	0.26	15.17	1,435 AED	2.17	24.11
Bahrain (BAX)	1,867.78	0.01	-0.81	-0.76	-0.76	3.92	19 BHD	1.76	11.45
MUSCAT SE INDEX	4,529.97	-0.25	-0.60	0.04	0.04	9.70	5 OMR	0.93	13.25
SP GCC Comp LMC	190.42	0.00	-2.98	-0.14	-0.14	0.35			
SP UAE PRICE INDEX	138.95	1.08	-1.27	0.16	0.16	-5.78			
Developed Markets									
MSCI World Index	2,376.64	-1.45	-4.11	-0.08	-0.08	-26.46			
U.K. (FTSE 100)	6,858.79	0.12	-1.98	-0.51	-0.51	-7.12			
Japan (Topix)	1,898.19	2.35	-1.26	3.39	3.39	-4.73			
Emerging Markets									
MSCI EM Index	863.33	1.03	-5.19	-1.42	-1.42	-29.93			
China (SSE Composite)	3,071.99	1.84	1.57	1.57	1.57	-15.60			
India (Sensex)	57,919.97	1.20	-0.52	0.86	0.86	-0.57			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	6,938.05	-0.70	-3.38	-2.36	-2.36	-1.49	44.53 KWD	2.22	21.01
Kuwait Premier Index	7,756.86	-0.90	-3.53	-2.43	-2.43	1.54	35.13 KWD	2.37	22.48
Kuwait Main Index	5,227.30	0.10	-2.76	-2.08	-2.08	-11.20	9.40 KWD	1.63	15.50
NIC 50	8,687.12	-0.86	-3.54	-2.44	-2.44	1.93	28.60 KWD	2.35	21.48
Kuwait Sector									
Banking	1,703.73	-0.60	-3.54	-2.27	-2.27	4.99	28.62 KWD	1.23	23.48
Telecom	1,135.78	-0.60	-3.85	-2.37	-2.37	4.26	3.48 KWD	0.83	12.54
Industrials	1,004.11	-0.59	-1.95	-1.23	-1.23	-12.04	3.55 KWD	0.80	10.52
Financial services	1,201.10	-1.27	-3.37	-4.20	-4.20	-15.61	3.13 KWD	0.59	12.87
Real estate	1,167.39	-0.81	-3.77	-2.89	-2.89	-11.99	2.52 KWD	0.59	25.58
Basic materials	827.05	-2.63	-6.92	-8.25	-8.25	-19.29	0.74 KWD	1.31	8.84
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	460.82	1.13	-3.53	-1.40	-1.40	-36.97	0.71 KWD	0.91	9.84
Insurance	1,570.36	-0.25	0.54	4.61	4.61	2.41	0.65 KWD	0.83	8.02
Consumer Disc	1,381.73	-1.64	-1.63	-0.25	-0.25	3.37	0.14 KWD	0.91	18.90
Energy	1,011.78	-1.01	-2.92	-5.22	-5.22	-29.15	0.21 KWD	0.75	10.99
Technology	582.00	2.56	1.27	-1.23	-1.23	-14.89	0.01 KWD	0.70	0.00
Utilities	500.00	0.00	-1.55	-2.56	-2.56	-16.67	0.21 KWD	2.14	14.55



What Move the GCC markets

Oil Prices

Oil prices plummeted more than 3% on Friday as global recession fears and weak oil demand, especially in China, outweighed support from a large cut to the OPEC+ supply target. Brent crude futures dropped \$2.94, or 3.1%, to settle at \$91.63 a barrel.

Kuwait Market

The market closed down today by -0.70% at 6,938.05 value traded 26.3 million KD, Premier market value traded reached 21.2 million KD and closed at 7,756.86 down by -0.90%.

KSA Market

The market closed down today by -0.14% at 11,405.88.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



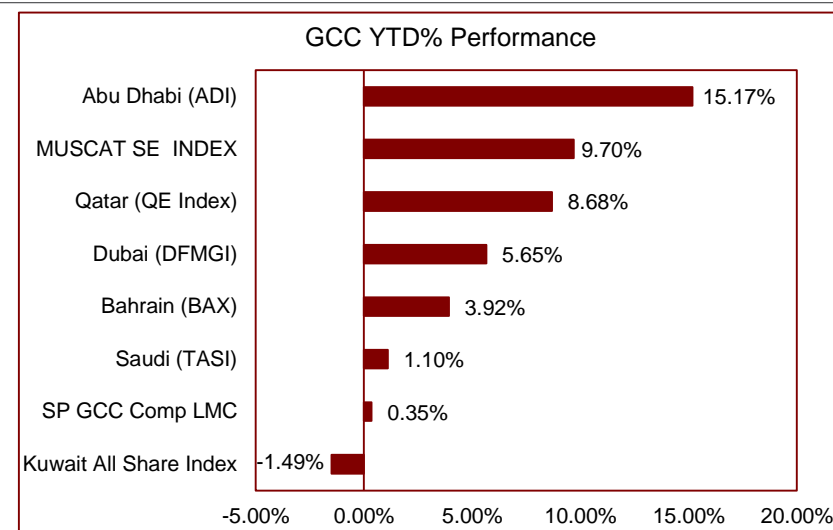
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.015	-0.49	-1.07	4.00	4.00	6.90	7.66 KWD	1.97	27.00
KFH	0.764	-1.04	-7.28	-9.16	-9.16	1.01	10.16 KWD	3.27	32.00
Zain	0.572	-1.38	-3.05	-2.22	-2.22	-3.87	2.47 KWD	2.08	12.54
BOUBYAN BANK	0.787	-1.13	-2.60	2.88	2.88	10.48	2.94 KWD	3.17	34.00
Agility	0.668	-0.15	-1.33	0.00	0.00	-15.17	1.79 KWD	1.14	2.11
Saudi Arabia									
ARAMCO	35.00	-1.13	-2.78	-2.37	-2.37	7.54	7,701.03 SAR	5.91	14.73
SABIC	89.70	-0.33	-5.28	1.01	1.01	-22.67	269.14 SAR	1.49	35.00
STC	37.95	0.00	-3.44	-3.56	-3.56	-15.59	189.78 SAR	2.64	16.61
AL-RAJHI BANK	81.70	0.49	-2.97	0.49	0.49	-7.81	326.84 SAR	3.99	22.20
NCB	61.00	0.00	-5.86	-3.33	-3.33	-5.28	273.19 SAR	1.68	15.49
United Arab Emirates									
ETISALAT.AD	23.80	2.67	-0.50	1.88	1.88	-24.92	206.97 AED	4.39	22.11
FAB.AD	17.32	0.58	-3.78	-3.02	-3.02	-6.99	191.33 AED	1.72	12.88
EMIRATES NBD	12.95	0.78	-0.38	0.78	0.78	-4.43	81.80 AED	0.96	8.78
DB ISLAMIC BK	6.02	0.33	1.18	0.67	0.67	11.90	43.59 AED	1.11	9.10
EMAAR PROPERT	6.10	2.52	2.35	5.35	5.35	24.74	49.89 AED	0.78	6.75
Qatar									
QNB	19.50	-0.51	-4.88	-2.01	-2.01	-3.42	180.11 QAR	1.72	13.96
INDUSTRIES QAT	17.00	-0.64	-3.63	0.59	0.59	9.75	102.85 QAR	2.64	10.30
QA ISLAMIC BK	24.04	-1.88	-4.75	-2.67	-2.67	31.15	56.80 QAR	2.25	15.87
MASRAF AL RAYA	4.00	-0.12	-3.99	-3.03	-3.03	-13.90	37.15 QAR	1.56	19.98
MESAIEED PETRO	2.38	-0.83	-1.49	1.45	1.45	14.07	29.95 QAR	1.79	15.05
OMAN									
BANK MUSCAT	0.578	0.00	-1.70	0.70	0.70	25.39	2.16 OMR	1.02	8.33
OMANTEL	0.900	1.35	3.21	2.27	2.27	19.68	0.67 OMR	1.17	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	0.00	-0.38	-2.22	-2.22	34.01	0.43 QAR	0.76	12.71
OMINVEST	0.330	-1.79	-1.79	-0.60	-0.60	7.84	0.22 QAR	0.73	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-Oct 22	23.66%	16.51%	0.06%	1.20%	0.37%	5.81%	17.77%	11.58%	5.65%	4.13%
12-Oct 22	23.79%	16.76%	0.06%	1.20%	0.36%	5.82%	17.77%	11.73%	5.74%	4.60%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.7 % The leading sector bottom performance indices today are Basic materials -2.63 % Consumer Disc -1.64 % Financial services -1.27 % respectively

KSA

Saudi Armco has a negative performance today by -1.13 %, SABIC has a negative performance today by -0.33 %, STC flat performance today, Al Rajhi Bank has a positive performance today by + 0.49 %

U.A.E

ETISALAT .AD has a positive performance today by + 2.67 %, FAB.AD has a positive performance today by + 0.58 %



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