



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , October 18th 2022

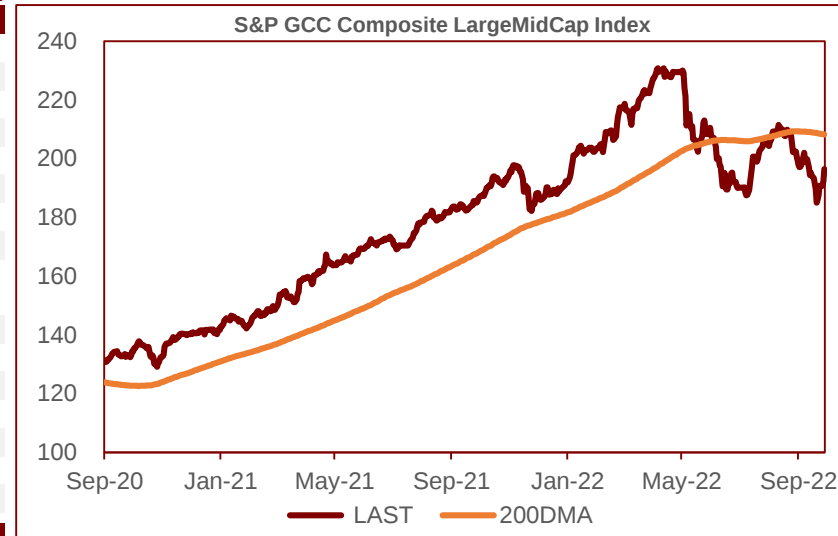




Market Watch

Tuesday, October 18, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,809.95	2.11	3.40	3.55	3.55	4.68	10,900 SAR	1.90	17.12
Qatar (QE Index)	12,722.12	0.65	0.03	0.21	0.21	9.43	645 QAR	1.52	14.37
Dubai (DFMGI)	3,410.06	0.98	1.81	2.12	2.12	6.70	460 AED	1.36	13.70
Abu Dhabi (ADI)	10,084.40	3.51	4.00	3.42	3.42	18.80	1,435 AED	2.21	23.73
Bahrain (BAX)	1,865.23	-0.09	-0.13	-0.89	-0.89	3.78	19 BHD	1.77	11.43
MUSCAT SE INDEX	4,489.75	-0.45	-1.14	-0.85	-0.85	8.72	5 OMR	0.92	13.25
SP GCC Comp LMC	196.02	2.03	2.94	2.79	2.79	3.30			
SP UAE PRICE INDEX	140.26	1.03	2.03	1.11	1.11	-4.89			
Developed Markets									
MSCI World Index	2,457.86	1.07	1.91	3.33	3.33	-23.95			
U.K. (FTSE 100)	6,936.74	0.24	1.26	0.62	0.62	-6.06			
Japan (Topix)	1,901.44	1.16	2.53	3.57	3.57	-4.56			
Emerging Markets									
MSCI EM Index	879.07	1.54	2.87	0.38	0.38	-28.65			
China (SSE Composite)	3,080.96	-0.13	2.14	1.87	1.87	-15.35			
India (Sensex)	58,960.60	0.94	3.01	2.67	2.67	1.21			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,088.22	2.01	1.45	-0.25	-0.25	0.64	45.51 KWD	2.27	21.45
Kuwait Premier Index	7,929.34	2.09	1.30	-0.26	-0.26	3.80	35.94 KWD	2.43	22.94
Kuwait Main Index	5,327.84	1.71	2.02	-0.20	-0.20	-9.49	9.56 KWD	1.64	15.83
NIC 50	8,887.15	2.11	1.29	-0.27	-0.27	4.28	28.60 KWD	2.41	21.94
Kuwait Sector									
Banking	1,735.88	1.78	1.28	-0.43	-0.43	6.97	29.17 KWD	1.26	23.94
Telecom	1,162.97	2.29	1.78	-0.04	-0.04	6.76	3.57 KWD	0.85	12.79
Industrials	1,050.27	4.06	3.98	3.31	3.31	-7.99	3.72 KWD	0.80	10.74
Financial services	1,240.50	2.89	1.97	-1.06	-1.06	-12.84	3.21 KWD	0.61	13.26
Real estate	1,202.24	2.02	2.15	0.01	0.01	-9.36	2.59 KWD	0.60	25.77
Basic materials	814.84	1.75	-4.06	-9.60	-9.60	-20.49	0.73 KWD	1.31	8.67
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	459.77	1.35	0.90	-1.62	-1.62	-37.11	0.71 KWD	0.91	10.13
Insurance	1,555.81	-0.75	-1.18	3.64	3.64	1.46	0.64 KWD	0.80	8.02
Consumer Disc	1,391.30	0.08	-0.96	0.44	0.44	4.09	0.14 KWD	0.90	18.95
Energy	1,034.17	3.57	1.18	-3.13	-3.13	-27.59	0.22 KWD	0.79	11.31
Technology	600.19	1.23	5.77	1.85	1.85	-12.23	0.01 KWD	0.73	0.00
Utilities	500.00	0.00	0.00	-2.56	-2.56	-16.67	0.21 KWD	2.14	14.55



What Move the GCC markets

Oil Prices

Oil prices edged lower on Tuesday on fears of an economic slowdown and lower fuel demand from China as it persists with its stringent zero-COVID policy. Brent crude futures fell 41 cents, or 0.45%, to \$91.21 a barrel by 0948 GMT while U.S. West Texas Intermediate (WTI) crude futures fell 41 cents, or 0.48%, to \$85.05.

Kuwait Market

The market closed up today by + 2.01% at 7,088.22 value traded 58.8 million KD, Premier market value traded reached 48.5 million KD and closed at 7,929.34 up by + 2.09%.

KSA Market

The market closed up today by + 2.11% at 11,809.95.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



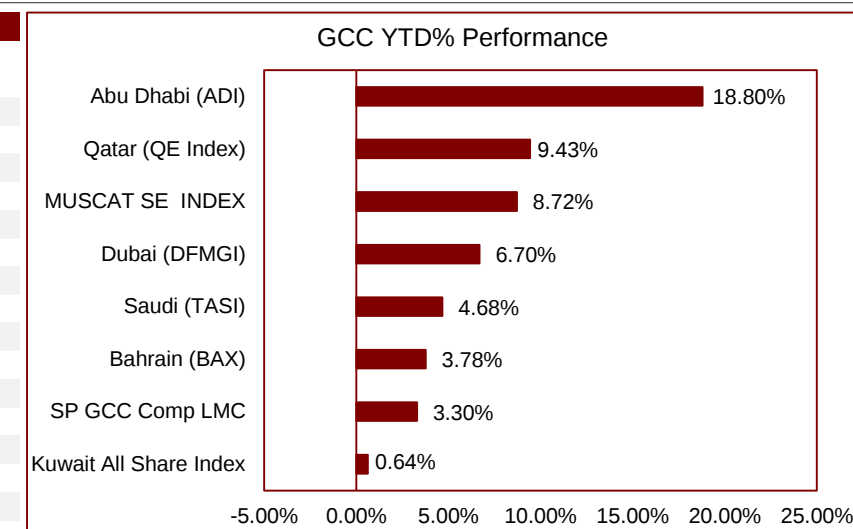
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.016	0.30	-0.39	4.10	4.10	7.00	7.67 KWD	1.97	27.00
KFH	0.790	3.27	2.33	-6.06	-6.06	4.45	10.51 KWD	3.38	32.00
Zain	0.588	2.62	1.38	0.51	0.51	-1.18	2.54 KWD	2.14	12.89
BOUBAYAN BANK	0.805	1.77	1.13	5.23	5.23	13.00	3.01 KWD	3.25	34.00
Agility	0.722	6.96	7.92	8.08	8.08	-8.32	1.93 KWD	1.23	2.28
Saudi Arabia									
ARAMCO	35.60	1.14	0.56	-0.70	-0.70	9.39	7,823.67 SAR	6.01	14.65
SABIC	92.00	1.55	2.22	3.60	3.60	-20.69	275.71 SAR	1.53	35.00
STC	38.95	0.78	2.64	-1.02	-1.02	-13.37	194.54 SAR	2.71	16.91
AL-RAJHI BANK	86.00	3.12	5.78	5.78	5.78	-2.96	343.63 SAR	4.20	22.77
NCB	64.00	4.23	4.92	1.43	1.43	-0.62	286.29 SAR	1.76	15.59
United Arab Emirates									
ETISALAT.AD	23.74	0.76	2.42	1.63	1.63	-25.11	206.47 AED	4.38	22.05
FAB.AD	17.72	2.43	2.90	-0.78	-0.78	-4.85	195.77 AED	1.76	13.17
EMIRATES NBD	13.20	0.76	2.72	2.72	2.72	-2.58	83.38 AED	0.98	8.95
DB ISLAMIC BK	6.06	1.51	1.00	1.34	1.34	12.64	43.88 AED	1.11	9.17
EMAAR PROPERT	6.17	0.82	3.70	6.56	6.56	26.18	50.47 AED	0.79	6.83
Qatar									
QNB	19.70	1.81	0.51	-1.01	-1.01	-2.43	181.96 QAR	1.73	14.11
INDUSTRIES QAT	17.10	0.29	-0.06	1.18	1.18	10.39	103.46 QAR	2.66	10.36
QA ISLAMIC BK	24.00	-0.66	-2.04	-2.83	-2.83	30.93	56.71 QAR	2.15	15.39
MASRAF AL RAYA	4.05	1.25	1.25	-1.70	-1.70	-12.72	37.67 QAR	1.58	20.26
MESAIEED PETRO	2.41	0.42	0.21	2.51	2.51	15.26	30.26 QAR	1.81	15.21
OMAN									
BANK MUSCAT	0.568	-1.05	-1.73	-1.05	-1.05	23.22	2.13 OMR	1.00	8.33
OMANTEL	0.880	-0.90	0.00	0.00	0.00	17.02	0.66 OMR	1.14	7.69
BANK DHOFAR	0.145	0.00	-3.33	2.11	2.11	15.08	0.43 QAR	0.62	14.93
NAT BANK OF OMAN	0.264	0.00	0.00	-2.22	-2.22	34.01	0.43 QAR	0.76	12.71
OMINVEST	0.330	0.00	-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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Leading Sector, Security Performance

Kuwait

The market is up today by + 2.01 %The leading sector best performance indices today are Industrials 4.06 % Energy 3.57 % Financial services 2.89 % respectively

KSA

Saudi Armco has a positive performance today by + 1.14 %, SABIC have positive performance today by + 1.55 %, STC has a positive performance today by + 0.78 %, Al Rajhi Bank has a positive performance today by + 3.12 %

U.A.E

ETISALAT .AD have negative performance today by -1.01 %, FAB.AD has a negative performance today by -0.12 %



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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