



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday , October 19th 2022

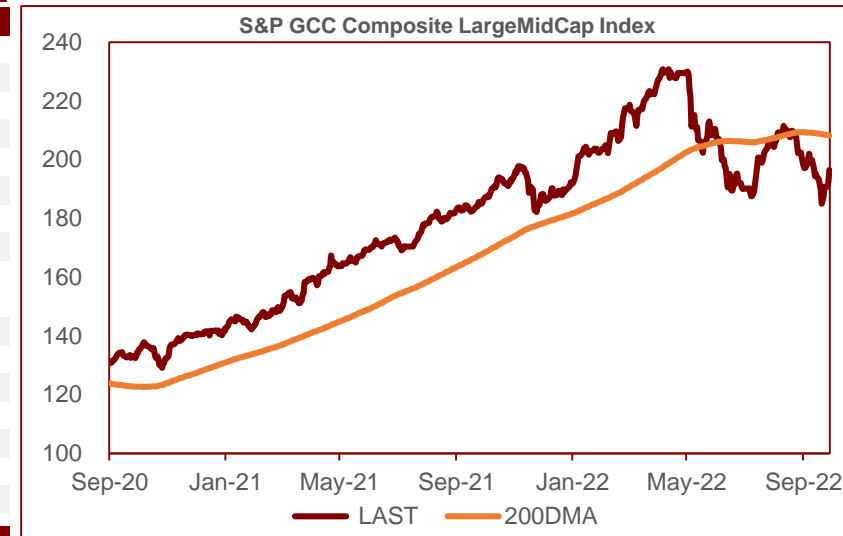




Market Watch

Wednesday, October 19, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,795.10	-0.13	3.27	3.42	3.42	4.55	10,943 SAR	1.92	17.14
Qatar (QE Index)	12,652.71	-0.55	-0.52	-0.34	-0.34	8.83	640 QAR	1.51	14.33
Dubai (DFMGI)	3,388.75	-0.62	1.17	1.49	1.49	6.03	456 AED	1.35	13.65
Abu Dhabi (ADI)	10,066.90	-0.17	3.82	3.24	3.24	18.60	1,435 AED	2.21	23.67
Bahrain (BAX)	1,867.17	0.10	-0.02	-0.79	-0.79	3.89	19 BHD	1.77	11.30
MUSCAT SE INDEX	4,479.33	-0.23	-1.37	-1.08	-1.08	8.47	5 OMR	0.92	13.25
SP GCC Comp LMC	195.64	-0.20	2.74	2.59	2.59	3.10			
SP UAE PRICE INDEX	139.99	-0.19	1.83	0.91	0.91	-5.07			
Developed Markets									
MSCI World Index	2,439.30	-0.76	1.14	2.55	2.55	-24.52			
U.K. (FTSE 100)	6,924.99	-0.17	1.09	0.45	0.45	-6.22			
Japan (Topix)	1,905.06	0.19	2.72	3.76	3.76	-4.38			
Emerging Markets									
MSCI EM Index	865.91	-1.50	1.33	-1.13	-1.13	-29.72			
China (SSE Composite)	3,044.38	-1.19	0.93	0.66	0.66	-16.36			
India (Sensex)	59,107.19	0.25	3.27	2.93	2.93	1.46			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,138.36	0.71	2.16	0.46	0.46	1.35	45.84 KWD	2.28	21.17
Kuwait Premier Index	7,993.82	0.81	2.13	0.55	0.55	4.64	36.25 KWD	2.44	22.57
Kuwait Main Index	5,342.54	0.28	2.30	0.08	0.08	-9.24	9.59 KWD	1.64	15.87
NIC 50	8,957.63	0.00	2.12	0.54	0.54	5.11	28.60 KWD	2.42	21.57
Kuwait Sector									
Banking	1,749.60	0.79	2.08	0.36	0.36	7.82	29.40 KWD	1.28	23.57
Telecom	1,169.01	0.52	2.31	0.48	0.48	7.31	3.58 KWD	0.89	12.84
Industrials	1,056.20	0.56	4.57	3.90	3.90	-7.47	3.73 KWD	0.76	10.80
Financial services	1,246.38	0.47	2.46	-0.59	-0.59	-12.43	3.23 KWD	0.61	13.14
Real estate	1,204.41	0.18	2.33	0.19	0.19	-9.20	2.60 KWD	0.59	25.66
Basic materials	852.43	4.61	0.36	-5.43	-5.43	-16.82	0.76 KWD	1.28	9.26
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	458.05	-0.37	0.52	-1.99	-1.99	-37.35	0.72 KWD	0.91	10.11
Insurance	1,548.43	-0.47	-1.65	3.15	3.15	0.98	0.64 KWD	0.78	8.02
Consumer Disc	1,391.89	0.04	-0.92	0.48	0.48	4.13	0.14 KWD	0.89	18.90
Energy	1,033.71	-0.04	1.14	-3.17	-3.17	-27.62	0.22 KWD	0.78	11.27
Technology	614.74	2.42	8.33	4.32	4.32	-10.11	0.01 KWD	0.74	0.00
Utilities	502.63	0.53	0.53	-2.05	-2.05	-16.23	0.21 KWD	2.15	14.62



What Move the GCC markets

Oil Prices

Oil prices rose slightly on Wednesday amid plenty of caution as bullish signals like falling U.S. crude stocks and a generally undersupplied market were countered by bearish factors such as uncertain Chinese demand growth and falling gas prices. Brent crude futures for December settlement rose 76 cents, or 0.8%, to \$90.79 a barrel.

Kuwait Market

The market closed up today by + 0.71% at 7,138.36 value traded 57.2 million KD, Premier market value traded reached 47.2 million KD and closed at 7,993.382 up by + 0.81%.

KSA Market

The market closed down today by - 0.13% at 11,795.10.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



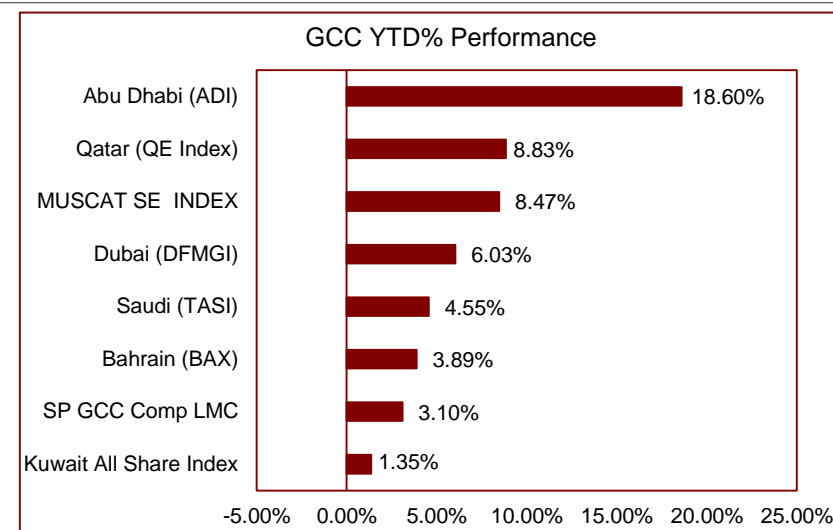
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	1.035	1.87	1.47	6.05	6.05	9.00	7.82 KWD	1.99	27.00
KFH	0.794	0.51	2.85	-5.59	-5.59	4.98	10.57 KWD	3.40	32.00
Zain	0.586	-0.34	1.03	0.17	0.17	-1.51	2.54 KWD	2.14	12.84
BOUBYAN BANK	0.804	-0.12	1.01	5.10	5.10	12.86	3.01 KWD	3.24	34.00
Agility	0.734	1.66	9.72	9.88	9.88	-6.79	1.96 KWD	1.25	2.32
Saudi Arabia									
ARAMCO	35.75	0.42	0.99	-0.28	-0.28	9.85	7,870.24 SAR	6.04	14.81
SABIC	92.20	0.22	2.44	3.83	3.83	-20.52	276.78 SAR	1.53	35.00
STC	38.55	-1.03	1.58	-2.03	-2.03	-14.26	192.88 SAR	2.68	17.04
AL-RAJHI BANK	85.70	-0.35	5.41	5.41	5.41	-3.30	343.03 SAR	4.18	23.48
NCB	64.30	0.47	5.41	1.90	1.90	-0.16	288.13 SAR	1.77	16.25
United Arab Emirates									
ETISALAT.AD	23.60	-0.59	1.81	1.03	1.03	-25.55	205.23 AED	4.35	21.92
FAB.AD	17.80	0.45	3.37	-0.34	-0.34	-4.42	196.64 AED	1.76	13.23
EMIRATES NBD	12.95	-1.89	0.78	0.78	0.78	-4.43	81.80 AED	0.96	8.78
DB ISLAMIC BK	6.09	0.50	1.50	1.84	1.84	13.20	44.09 AED	1.12	9.21
EMAAR PROPERT	6.17	0.00	3.70	6.56	6.56	26.18	50.47 AED	0.79	6.83
Qatar									
QNB	19.60	-0.51	0.00	-1.51	-1.51	-2.92	181.03 QAR	1.73	14.04
INDUSTRIES QAT	16.80	-1.75	-1.81	-0.59	-0.59	8.46	101.64 QAR	2.61	10.18
QA ISLAMIC BK	24.00	0.00	-2.04	-2.83	-2.83	30.93	56.71 QAR	2.15	15.39
MASRAF AL RAYA	4.00	-1.19	0.05	-2.86	-2.86	-13.75	37.22 QAR	1.56	20.02
MESAIEED PETRO	2.38	-1.41	-1.21	1.06	1.06	13.64	29.84 QAR	1.78	14.99
OMAN									
BANK MUSCAT	0.572	0.70	-1.04	-0.35	-0.35	24.09	2.15 OMR	1.01	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	0.260	-1.52	-1.52	-3.70	-3.70	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.332	0.61	-1.19	0.00	0.00	8.50	0.22 QAR	0.73	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-Oct 22	23.79%	16.76%	0.06%	1.20%	0.36%	5.82%	17.77%	11.73%	5.74%	4.60%
19-Oct 22	23.83%	16.90%	0.06%	1.20%	0.37%	5.80%	17.79%	11.66%	5.77%	4.60%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.71 % The leading sector best performance indices today are Basic materials 4.61 % Technology 2.42 % Banking 0.79 % respectively

KSA

Saudi Armco has a positive performance today by + 0.42 %, SABIC has a positive performance today by + 0.21 %, STC has a negative performance today by -1.03 %, Al Rajhi Bank has a negative performance today by -0.35 %

U.A.E

ETISALAT .AD has a negative performance today by -0.59 %, FAB.AD has a positive performance today by + 0.45 %



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