



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday , October 20th 2022

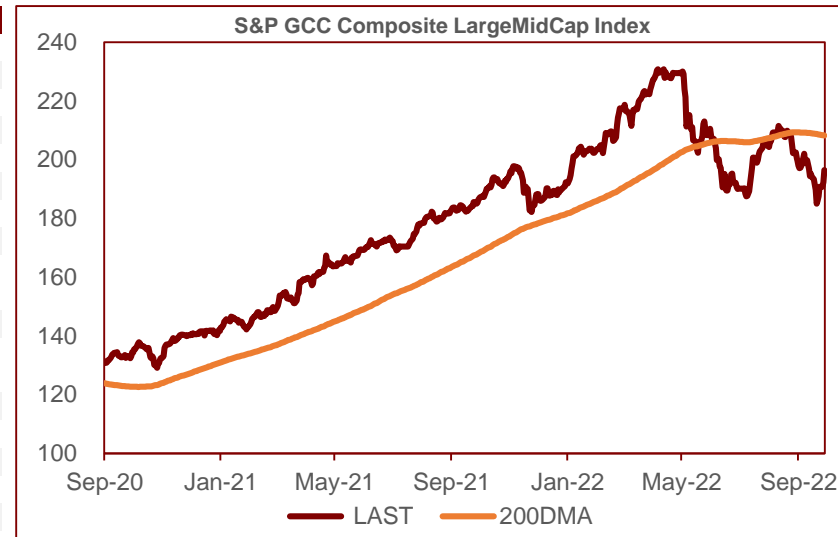




Market Watch

Thursday, October 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,963.68	1.43	4.74	4.90	4.90	6.04	11,038 SAR	1.93	16.95
Qatar (QE Index)	12,657.12	0.03	-0.48	-0.30	-0.30	8.87	639 QAR	1.52	14.29
Dubai (DFMGI)	3,398.67	0.29	1.46	1.78	1.78	6.34	457 AED	1.35	13.68
Abu Dhabi (ADI)	10,113.84	0.63	4.47	3.89	3.89	19.35	1,435 AED	2.23	23.74
Bahrain (BAX)	1,866.64	-0.03	-0.05	-0.82	-0.82	3.86	19 BHD	1.77	11.39
MUSCAT SE INDEX	4,452.96	-0.59	-1.95	-1.66	-1.66	7.83	5 OMR	0.92	13.25
SP GCC Comp LMC	198.29	1.35	4.12	3.97	3.97	4.49			
SP UAE PRICE INDEX	141.11	0.85	2.69	1.77	1.77	-4.27			
Developed Markets									
MSCI World Index	2,462.42	-0.41	0.73	2.13	2.13	-24.83			
U.S. (S&P 500)	3,752.75	-0.80	-0.11	2.24	2.24	-23.09			
U.K. (FTSE 100)	6,969.73	0.27	1.37	0.73	0.73	-5.97			
Japan (Topix)	1,881.98	-0.51	2.20	3.24	3.24	-4.86			
Emerging Markets									
MSCI EM Index	865.04	-0.13	1.20	-1.26	-1.26	-29.81			
China (SSE Composite)	3,038.93	-0.31	0.62	0.35	0.35	-16.61			
India (Sensex)	59,307.15	0.16	3.44	3.09	3.09	1.63			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,246.75	1.52	3.71	1.98	1.98	2.89	46.61 KWD	2.31	21.44
Kuwait Premier Index	8,119.48	1.57	3.73	2.13	2.13	6.29	36.88 KWD	2.48	22.90
Kuwait Main Index	5,411.90	1.30	3.63	1.38	1.38	-8.06	9.73 KWD	1.65	15.89
NIC 50	9,099.17	1.58	3.72	2.12	2.12	6.77	28.60 KWD	2.46	21.90
Kuwait Sector									
Banking	1,776.75	1.55	3.66	1.92	1.92	9.49	29.90 KWD	1.30	23.90
Telecom	1,197.05	2.40	4.76	2.89	2.89	9.88	3.68 KWD	0.95	13.06
Industrials	1,069.07	1.22	5.84	5.16	5.16	-6.34	3.79 KWD	0.78	10.89
Financial services	1,274.43	2.25	4.76	1.65	1.65	-10.46	3.30 KWD	0.63	13.20
Real estate	1,216.64	1.02	3.37	1.21	1.21	-8.28	2.63 KWD	0.61	25.84
Basic materials	860.44	0.94	1.30	-4.54	-4.54	-16.04	0.77 KWD	1.30	9.33
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	460.46	0.53	1.05	-1.47	-1.47	-37.02	0.72 KWD	0.92	10.12
Insurance	1,518.56	-1.93	-3.54	1.16	1.16	-0.97	0.63 KWD	0.78	8.02
Consumer Disc	1,396.99	0.37	-0.56	0.85	0.85	4.52	0.14 KWD	0.90	18.95
Energy	1,041.86	0.79	1.94	-2.41	-2.41	-27.05	0.22 KWD	0.76	11.51
Technology	636.56	3.55	12.18	8.03	8.03	-6.92	0.01 KWD	0.77	0.00
Utilities	505.26	0.52	1.05	-1.54	-1.54	-15.79	0.21 KWD	2.16	14.70



What Move the GCC markets

Oil Prices

Oil prices rose by more than \$1 on Thursday in response to tighter supplies and on news that China is considering a cut in the duration of quarantine for inbound visitors. Brent crude futures rose \$1.33, or 1.4%, to \$93.74 a barrel .

Kuwait Market

The market closed up today by + 1.52% at 7,246.75 value traded 65.8 million KD, Premier market value traded reached 54.0 million KD and closed at 8,119.48 up by + 1.57%.

KSA Market

The market closed up today by + 1.43% at 11,963.68.



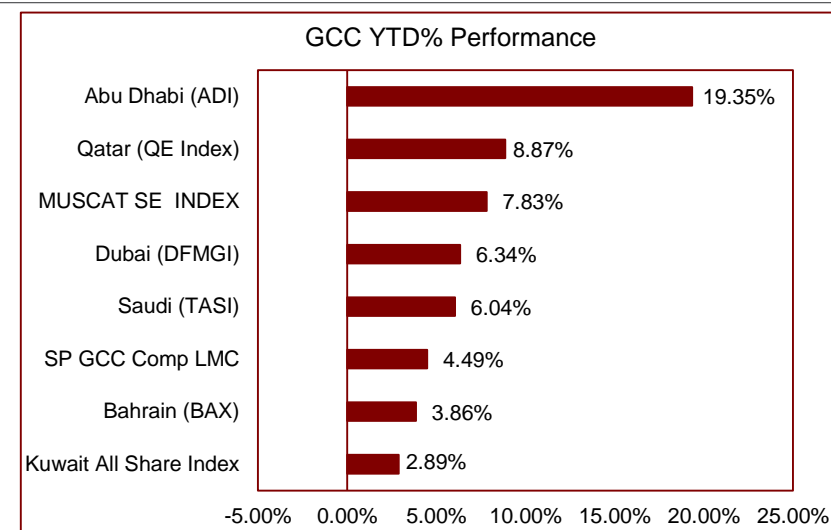
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	1.055	1.93	3.43	8.09	8.09	11.11	7.98 KWD	2.03	27.00
KFH	0.811	2.14	5.05	-3.57	-3.57	7.22	10.79 KWD	3.47	32.00
Zain	0.596	1.71	2.76	1.88	1.88	0.17	2.58 KWD	2.17	13.06
BOUBYAN BANK	0.808	0.50	1.51	5.62	5.62	13.43	3.03 KWD	3.20	34.00
Agility	0.743	1.23	11.06	11.23	11.23	-5.65	1.99 KWD	1.27	2.35
Saudi Arabia									
ARAMCO	36.05	0.84	1.84	0.56	0.56	10.77	7,927.83 SAR	6.09	14.87
SABIC	92.50	0.33	2.78	4.17	4.17	-20.26	277.39 SAR	1.54	35.00
STC	39.00	1.17	2.77	-0.89	-0.89	-13.26	194.92 SAR	2.71	16.87
AL-RAJHI BANK	87.70	2.33	7.87	7.87	7.87	-1.04	350.66 SAR	4.28	23.40
NCB	65.70	2.18	7.70	4.12	4.12	2.02	294.09 SAR	1.81	16.33
United Arab Emirates									
ETISALAT.AD	24.30	2.97	4.83	4.02	4.02	-23.34	212.20 AED	4.50	22.38
FAB.AD	17.84	0.22	3.60	-0.11	-0.11	-4.20	197.75 AED	1.77	13.26
EMIRATES NBD	13.10	1.16	1.95	1.95	1.95	-3.32	82.43 AED	0.97	8.88
DB ISLAMIC BK	6.09	0.00	1.50	1.84	1.84	13.20	44.10 AED	1.12	9.21
EMAAR PROPERT	6.16	-0.16	3.53	6.39	6.39	25.97	51.04 AED	0.80	6.82
Qatar									
QNB	19.41	-0.97	-0.97	-2.46	-2.46	-3.86	179.28 QAR	1.71	13.90
INDUSTRIES QAT	16.70	-0.60	-2.40	-1.18	-1.18	7.81	101.04 QAR	2.60	10.12
QA ISLAMIC BK	24.30	1.25	-0.82	-1.62	-1.62	32.57	57.42 QAR	2.18	15.59
MASRAF AL RAYA	4.11	2.70	2.75	-0.24	-0.24	-11.42	38.22 QAR	1.60	20.56
MESAIEED PETRO	2.38	0.21	-1.00	1.28	1.28	13.88	29.90 QAR	1.79	15.03
OMAN									
BANK MUSCAT	0.566	-1.05	-2.08	-1.39	-1.39	22.79	2.12 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	0.143	-1.38	-4.67	0.70	0.70	13.49	0.43 QAR	0.61	14.93
NAT BANK OF OMAN	0.260	0.00	-1.52	-3.70	-3.70	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.330	-0.60	-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
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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Leading Sector, Security Performance

Kuwait

The market is up today by + 1.52 %The leading sector best performance indices today are Technology 3.55 % Telecom 2.4 % Financial services 2.25 % respectively

KSA

Saudi Armco has a positive performance today by + 0.84 %, SABIC has a positive performance today by + 0.33 %, STC has a positive performance today by + 1.17 %, Al Rajhi Bank has a positive performance today by + 2.33 %

U.A.E

ETISALAT .AD has a positive performance today by + 2.97 %, FAB.AD has a positive performance today by + 0.22 %



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