



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, October 24th 2022





Market Watch

Monday, October 24, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,075.27	0.57	0.93	5.87	5.87	7.03	11,178 SAR	1.97	17.26
Qatar (QE Index)	12,499.17	-0.75	-1.25	-1.54	-1.54	7.51	631 QAR	1.51	14.25
Dubai (DFMGI)	3,377.06	-0.64	-0.63	1.14	1.14	5.67	454 AED	1.34	13.40
Abu Dhabi (ADI)	10,067.94	-0.45	-0.62	3.25	3.25	18.61	1,435 AED	2.22	23.72
Bahrain (BAX)	1,863.78	-0.14	-0.15	-0.97	-0.97	3.70	19 BHD	0.00	11.39
MUSCAT SE INDEX	4,373.86	-0.99	-1.78	-3.41	-3.41	5.92	5 OMR	0.00	13.25
SP GCC Comp LMC	198.75	0.11	0.24	4.22	4.22	4.74			
SP UAE PRICE INDEX	140.37	-0.53	-0.57	1.19	1.19	-4.81			

Developed Markets

MSCI World Index	2,493.06	1.24	2.63	4.81	4.81	-22.86			
U.S. (S&P 500)	3,797.34	1.19	3.59	5.90	5.90	-20.33			
U.K. (FTSE 100)	7,013.99	0.64	1.01	1.74	1.74	-5.02			
Japan (Topix)	1,887.19	0.28	-0.43	2.79	2.79	-5.28			

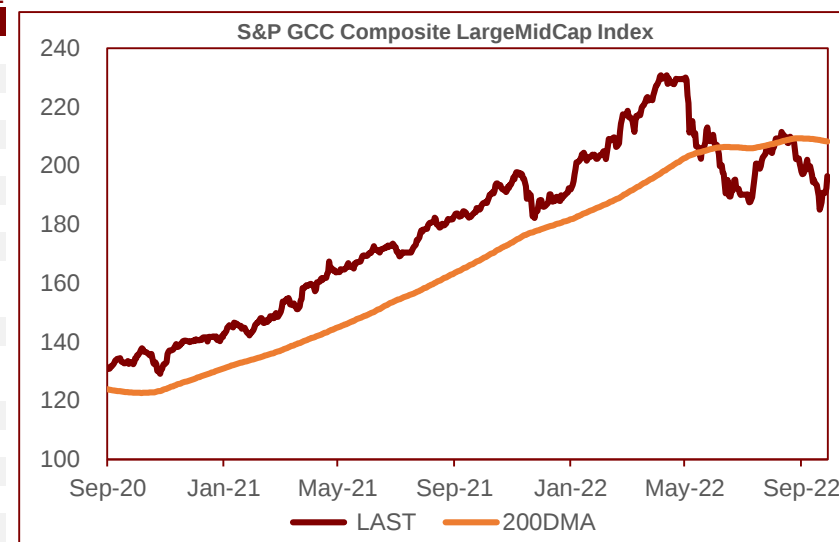
Emerging Markets

MSCI EM Index	842.76	-2.58	-2.54	-3.77	-3.77	-31.59			
China (SSE Composite)	2,977.56	-2.02	-1.89	-1.55	-1.55	-18.19			
India (Sensex)	59,831.66	0.88	1.06	4.19	4.19	2.71			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,200.98	-0.90	-0.63	1.34	1.34	2.24	46.30 KWD	2.27	21.27
Kuwait Premier Index	8,060.88	-1.03	-0.72	1.40	1.40	5.52	36.60 KWD	2.43	22.72
Kuwait Main Index	5,397.82	-0.39	-0.26	1.11	1.11	-8.30	9.70 KWD	1.64	15.80
NIC 50	9,099.17	1.58	-0.73	1.39	1.39	6.77	28.60 KWD	2.41	21.72

Kuwait Sector

Banking	1,768.89	-0.86	-0.44	1.47	1.47	9.00	29.76 KWD	1.31	23.72
Telecom	1,182.57	-0.70	-1.21	1.65	1.65	8.56	3.63 KWD	0.94	12.84
Industrials	1,061.88	-1.13	-0.67	4.46	4.46	-6.97	3.77 KWD	0.77	10.91
Financial services	1,263.19	-0.57	-0.88	0.75	0.75	-11.25	3.27 KWD	0.62	12.94
Real estate	1,204.86	-1.68	-0.97	0.23	0.23	-9.16	2.60 KWD	0.59	25.84
Basic materials	847.86	-2.07	-1.46	-5.94	-5.94	-17.26	0.76 KWD	1.27	9.23
Health care	447.63	-2.63	-2.63	-2.63	-2.63	-43.84	0.22 KWD	2.51	10.37
Consumer services	448.45	-0.23	-2.61	-4.04	-4.04	-38.66	0.71 KWD	0.95	10.47
Insurance	1,507.01	-0.33	-0.76	0.39	0.39	-1.72	0.62 KWD	0.77	8.02
Consumer Disc	1,385.96	-0.81	-0.79	0.06	0.06	3.69	0.14 KWD	0.88	18.49
Energy	1,032.70	-0.56	-0.88	-3.26	-3.26	-27.69	0.22 KWD	0.78	11.32
Technology	665.66	3.98	4.57	12.96	12.96	-2.66	0.01 KWD	0.81	0.00
Utilities	502.63	0.53	-0.52	-2.05	-2.05	-16.23	0.21 KWD	2.15	14.62



What Move the GCC markets

Oil Prices

Oil rose in early Asian trade on Monday as expectations of tighter supplies globally ahead of European Union sanctions on Russian oil underpinned prices. Brent crude futures climbed 54 cents, or 0.6%, to \$94.04 a barrel.

Kuwait Market

The market closed down today by - 0.90% at 7,200.98 value traded 43.3 million KD, Premier market value traded reached 35.4 million KD and closed at 8,060.88 down by - 1.03%.

KSA Market

The market closed up today by + 0.57% at 12,075.27.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



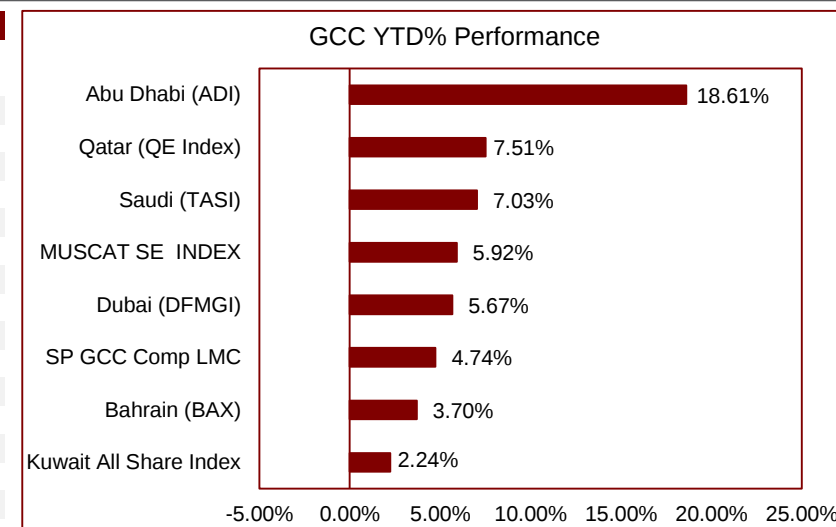
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.050	-0.76	-0.47	7.58	7.58	10.58	7.94 KWD	2.02	27.00
KFH	0.806	-1.47	-0.62	-4.16	-4.16	6.56	10.74 KWD	3.32	32.00
Zain	0.586	-0.68	-1.68	0.17	0.17	-1.51	2.54 KWD	2.14	12.84
BOUBYAN BANK	0.804	-0.62	-0.50	5.10	5.10	12.86	3.01 KWD	3.19	34.00
Agility	0.730	-2.14	-1.75	9.28	9.28	-7.30	1.96 KWD	1.25	2.31
Saudi Arabia									
ARAMCO	36.50	0.00	1.25	1.81	1.81	12.15	8,028.93 SAR	6.17	15.19
SABIC	94.00	0.32	1.62	5.86	5.86	-18.97	281.96 SAR	1.56	35.00
STC	39.40	-0.25	1.03	0.13	0.13	-12.37	196.97 SAR	2.74	17.28
AL-RAJHI BANK	88.10	0.69	0.46	8.36	8.36	-0.59	352.35 SAR	4.30	23.07
NCB	65.90	0.00	0.30	4.44	4.44	2.33	295.06 SAR	1.82	16.74
United Arab Emirates									
ETISALAT.AD	24.20	-0.41	-0.49	3.92	3.92	-23.34	210.47 AED	4.46	22.28
FAB.AD	17.80	-0.56	-0.22	-0.34	-0.34	-4.42	196.65 AED	1.76	13.23
EMIRATES NBD	12.95	-0.77	-1.15	0.78	0.78	-4.43	81.80 AED	0.96	8.78
DB ISLAMIC BK	6.03	-0.99	-0.99	0.84	0.84	12.08	43.66 AED	1.11	9.12
EMAAR PROPERT	6.19	-0.80	0.49	6.91	6.91	26.58	50.63 AED	0.79	6.85
Qatar									
QNB	19.27	-0.41	-0.72	-3.17	-3.17	-4.56	177.99 QAR	1.70	13.80
INDUSTRIES QAT	16.37	-0.85	-1.98	-3.14	-3.14	5.68	99.04 QAR	2.55	9.92
QA ISLAMIC BK	24.29	-0.41	-0.04	-1.66	-1.66	32.52	57.40 QAR	2.18	15.58
MASRAF AL RAYA	4.01	-2.81	-2.36	-2.60	-2.60	-13.51	37.32 QAR	1.56	20.08
MESAIEED PETRO	2.38	-0.21	0.00	1.28	1.28	13.88	29.90 QAR	1.79	15.03
OMAN									
BANK MUSCAT	0.566	0.00	0.00	-1.39	-1.39	22.79	2.13 OMR	1.00	8.33
OMANTEL	0.852	-4.05	-3.18	-3.18	-3.18	13.30	0.64 OMR	1.10	7.69
BANK DHOFAR	0.141	-1.40	-1.40	-0.70	-0.70	11.90	0.42 QAR	0.60	14.93
NAT BANK OF OMAN	0.260	0.39	0.00	-3.70	-3.70	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.332	0.61	0.61	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 down today by -0.9 %The leading sector bottom performance indices today are Health care -2.63 % Basic materials -2.07 % Real estate -1.68 % respectively

KSA

Saudi Armco flat performance today, SABIC has a positive performance today by + 0.32 %, STC has a negative performance today by -0.25 %, Al Rajhi Bank has a positive performance today by + 0.69 %

U.A.E

ETISALAT .AD has a negative performance today by - 0.41 %, FAB.AD has a negative performance today by -0.56 %



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