

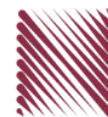


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, October 25th 2022

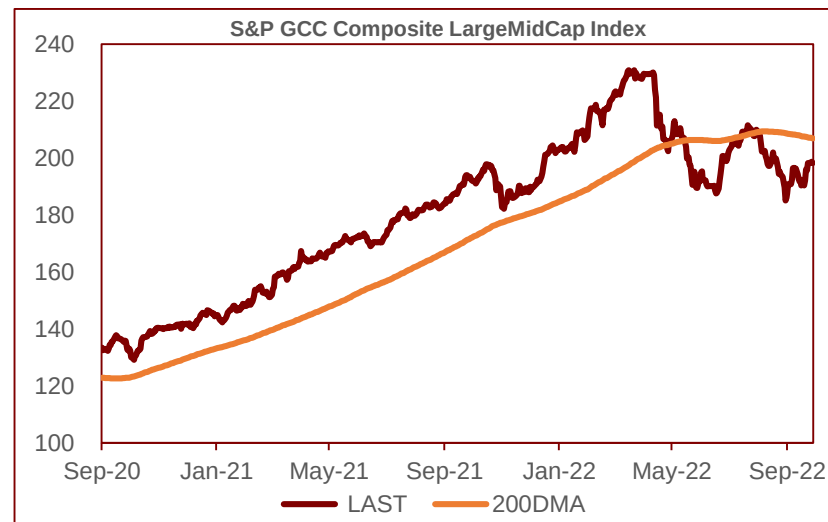




Market Watch

Tuesday, October 25, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,973.86	-0.84	0.09	4.98	4.98	6.14	10,997 SAR	1.93	17.36
Qatar (QE Index)	12,411.00	-0.71	-1.94	-2.24	-2.24	6.75	626 QAR	1.50	14.35
Dubai (DFMGI)	3,376.52	-0.02	-0.65	1.12	1.12	5.65	455 AED	1.33	13.34
Abu Dhabi (ADI)	10,060.00	-0.08	-0.70	3.17	3.17	18.52	1,435 AED	2.21	23.74
Bahrain (BAX)	1,861.07	-0.15	-0.30	-1.11	-1.11	3.55	19 BHD	0.00	11.25
MUSCAT SE INDEX	4,403.60	0.68	-1.11	-2.75	-2.75	6.64	5 OMR	0.00	13.25
SP GCC Comp LMC	198.27	-0.24	0.00	3.97	3.97	4.48			
SP UAE PRICE INDEX	140.85	0.34	-0.23	1.54	1.54	-4.49			
Developed Markets									
MSCI World Index	2,537.54	1.78	4.46	6.68	6.68	-21.48			
U.S. (S&P 500)	3,859.11	1.63	5.27	7.63	7.63	-19.03			
U.K. (FTSE 100)	7,013.48	-0.01	1.00	1.74	1.74	-5.02			
Japan (Topix)	1,907.14	1.06	0.62	3.88	3.88	-4.28			
Emerging Markets									
MSCI EM Index	844.51	0.21	-2.34	-3.57	-3.57	-31.45			
China (SSE Composite)	2,976.28	-0.04	-1.94	-1.59	-1.59	-18.23			
India (Sensex)	59,543.96	-0.48	0.58	3.69	3.69	2.21			
Kuwait									
Kuwait All Share Index	7,223.33	0.31	-0.32	1.66	1.66	2.56	46.30 KWD	2.27	21.32
Kuwait Premier Index	8,102.20	0.51	-0.21	1.92	1.92	6.06	36.68 KWD	2.44	22.81
Kuwait Main Index	5,369.84	-0.52	-0.78	0.59	0.59	-8.77	9.61 KWD	1.63	15.61
NIC 50	9,099.17	0.00	-0.22	1.91	1.91	6.77	28.60 KWD	2.42	21.81
Kuwait Sector									
Banking	1,774.83	0.34	-0.11	1.81	1.81	9.37	29.77 KWD	1.32	23.81
Telecom	1,192.49	0.84	-0.38	2.50	2.50	9.47	3.65 KWD	0.95	12.90
Industrials	1,068.04	0.58	-0.10	5.06	5.06	-6.43	3.77 KWD	0.77	10.83
Financial services	1,261.53	-0.13	-1.01	0.62	0.62	-11.37	3.25 KWD	0.62	12.80
Real estate	1,209.43	0.38	-0.59	0.61	0.61	-8.82	2.60 KWD	0.59	25.53
Basic materials	845.88	-0.23	-1.69	-6.16	-6.16	-17.46	0.75 KWD	1.30	9.19
Health care	444.60	-0.68	-3.29	-3.29	-3.29	-44.22	0.22 KWD	2.51	10.15
Consumer services	451.55	0.69	-1.94	-3.38	-3.38	-38.24	0.71 KWD	0.93	10.16
Insurance	1,481.36	-1.70	-2.45	-1.32	-1.32	-3.39	0.61 KWD	0.76	8.02
Consumer Disc	1,389.06	0.22	-0.57	0.28	0.28	3.92	0.14 KWD	0.89	18.54
Energy	1,031.41	-0.12	-1.00	-3.38	-3.38	-27.78	0.21 KWD	0.76	11.41
Technology	611.10	-8.20	-4.00	3.70	3.70	-10.64	0.01 KWD	0.74	0.00
Utilities	500.00	-0.52	-1.04	-2.56	-2.56	-16.67	0.21 KWD	2.14	14.55



What Move the GCC markets

Oil Prices

Oil prices fell by more than \$1 per barrel on Tuesday as bearish economic data from key global economies heightened demand fears. International benchmark Brent crude futures fell by \$1.41 to \$91.85 per barrel.

Kuwait Market

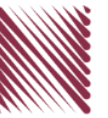
The market closed up today by + 0.31% at 7,233.33 value traded 37.1 million KD, Premier market value traded reached 29.5 million KD and closed at 8,102.20 up by + 0.51%.

KSA Market

The market closed down today by - 0.84% at 11,973.86.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



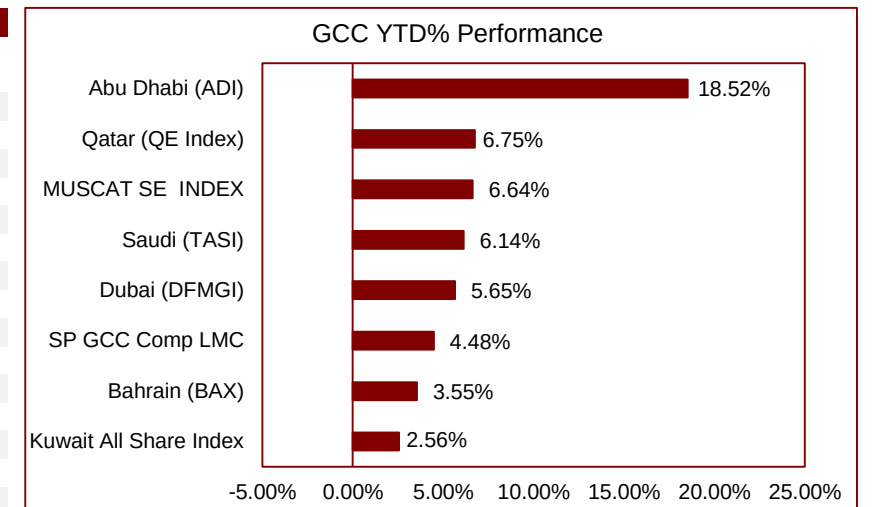
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.057	0.67	0.19	8.30	8.30	11.32	7.97 KWD	2.03	27.00
KFH	0.810	0.50	-0.12	-3.69	-3.69	7.09	10.76 KWD	3.34	32.00
Zain	0.591	0.85	-0.84	1.03	1.03	-0.67	2.55 KWD	2.15	12.95
BOUBYAN BANK	0.811	0.87	0.37	6.01	6.01	13.85	3.03 KWD	3.21	34.00
Agility	0.739	1.23	-0.54	10.63	10.63	-6.16	1.97 KWD	1.26	2.34
Saudi Arabia									
ARAMCO	35.75	-2.05	-0.83	-0.28	-0.28	9.85	7,866.05 SAR	6.04	15.19
SABIC	93.10	-0.96	0.65	4.84	4.84	-19.74	279.34 SAR	1.55	35.00
STC	40.40	2.54	3.59	2.67	2.67	-10.14	202.03 SAR	2.81	17.24
AL-RAJHI BANK	88.00	-0.11	0.34	8.24	8.24	-0.71	352.05 SAR	4.30	23.22
NCB	65.50	-0.61	-0.30	3.80	3.80	1.71	293.35 SAR	1.80	16.74
United Arab Emirates									
ETISALAT.AD	24.40	0.83	2.78	4.72	4.72	-23.03	210.46 AED	4.46	22.49
FAB.AD	17.76	-0.22	-0.45	-0.56	-0.56	-4.63	196.22 AED	1.76	13.20
EMIRATES NBD	13.15	1.54	0.38	2.33	2.33	-2.95	83.07 AED	0.97	8.92
DB ISLAMIC BK	5.95	-1.33	-2.30	-0.50	-0.50	10.59	43.08 AED	1.09	8.69
EMAAR PROPERT	6.19	0.00	0.49	6.91	6.91	26.58	50.64 AED	0.79	6.85
Qatar									
QNB	18.99	-1.45	-2.16	-4.57	-4.57	-5.94	175.40 QAR	1.67	13.60
INDUSTRIES QAT	16.14	-1.41	-3.35	-4.50	-4.50	4.20	97.65 QAR	2.51	9.78
QA ISLAMIC BK	24.19	-0.41	-0.45	-2.06	-2.06	31.97	57.16 QAR	2.17	15.52
MASRAF AL RAYA	4.04	0.67	-1.70	-1.94	-1.94	-12.93	37.57 QAR	1.57	20.21
MESAIEED PETRO	2.32	-2.52	-2.52	-1.28	-1.28	11.00	29.15 QAR	1.74	15.38
OMAN									
BANK MUSCAT	0.580	2.47	2.47	1.05	1.05	25.83	2.18 OMR	1.02	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	0.00	-1.40	-0.70	-0.70	11.90	0.42 QAR	0.60	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-3.70	-3.70	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.332	0.00	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 up today by + 0.31 %The leading sector best performance indices today are Telecom 0.84 % Consumer services 0.69 % Industrials 0.58 % respectively

KSA

Saudi Armco has a negative performance today by -2.05 %, SABIC has a negative performance today by -0.96 %, STC has a positive performance today by + 2.54 %, Al Rajhi Bank has a negative performance today by -0.11 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.83 %, FAB.AD has a negative performance today by -0.22 %



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