



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, October 27th 2022

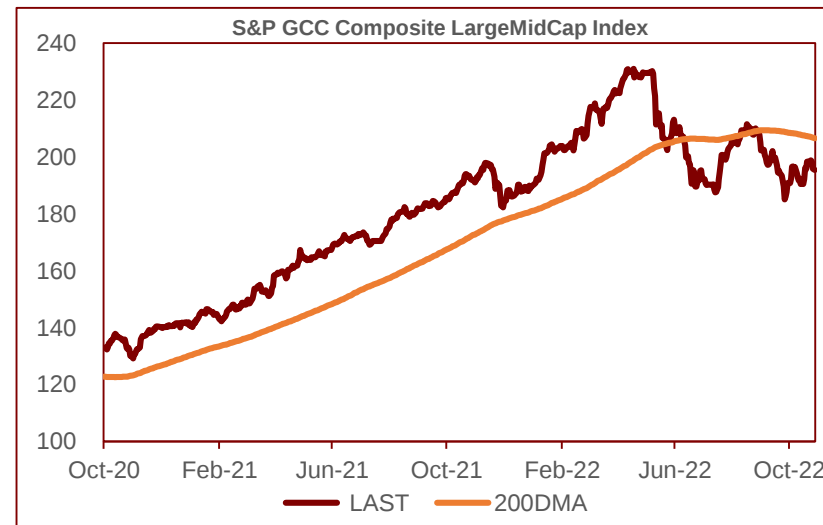




Market Watch

Thursday, October 27, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,709.50	-0.76	-2.12	2.67	2.67	3.79	10,691 SAR	1.86	17.59
Qatar (QE Index)	12,262.30	0.45	-3.12	-3.41	-3.41	5.47	622 QAR	1.48	14.03
Dubai (DFMGI)	3,349.31	0.63	-0.93	0.83	0.83	5.35	453 AED	1.31	13.21
Abu Dhabi (ADI)	10,286.89	2.06	1.64	5.59	5.59	21.30	1,435 AED	2.24	23.30
Bahrain (BAX)	1,863.73	0.23	-0.16	-0.97	-0.97	3.70	19 BHD	0.00	11.33
MUSCAT SE INDEX	4,401.05	-0.05	-1.17	-2.81	-2.81	6.57	5 OMR	0.00	13.25
SP GCC Comp LMC	195.42	-0.13	-1.33	2.59	2.59	3.09			
SP UAE PRICE INDEX	141.96	1.33	0.95	2.74	2.74	-3.35			
Developed Markets									
MSCI World Index	2,561.04	-0.48	3.88	6.09	6.09	-21.91			
U.S. (S&P 500)	3,901.06	-0.61	3.86	6.18	6.18	-20.12			
U.K. (FTSE 100)	7,047.67	0.25	1.87	2.61	2.61	-4.21			
Japan (Topix)	1,899.05	-0.66	0.54	3.79	3.79	-4.36			
Emerging Markets									
MSCI EM Index	845.58	0.90	-0.61	-1.86	-1.86	-30.24			
China (SSE Composite)	2,915.93	-0.55	-1.72	-1.37	-1.37	-18.05			
India (Sensex)	59,959.85	0.36	0.94	4.06	4.06	2.58			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,231.08	-0.14	-0.22	1.76	1.76	2.67	46.43 KWD	2.26	21.23
Kuwait Premier Index	8,091.48	-0.14	-0.34	1.78	1.78	5.92	36.70 KWD	2.42	22.70
Kuwait Main Index	5,428.85	-0.13	0.31	1.69	1.69	-7.77	9.73 KWD	1.63	15.68
NIC 50	9,099.17	0.00	-0.35	1.77	1.77	6.77	28.60 KWD	2.40	21.70
Kuwait Sector									
Banking	1,769.12	-0.09	-0.43	1.48	1.48	9.02	29.72 KWD	1.32	23.70
Telecom	1,208.53	0.30	0.96	3.88	3.88	10.94	3.71 KWD	0.99	13.08
Industrials	1,083.03	-1.08	1.31	6.54	6.54	-5.12	3.83 KWD	0.77	10.62
Financial services	1,254.91	-0.32	-1.53	0.09	0.09	-11.83	3.25 KWD	0.62	13.56
Real estate	1,216.21	-0.10	-0.04	1.17	1.17	-8.31	2.62 KWD	0.61	25.53
Basic materials	863.44	1.39	0.35	-4.21	-4.21	-15.74	0.77 KWD	1.29	9.45
Health care	481.97	1.86	4.84	4.84	4.84	-39.53	0.24 KWD	2.76	10.78
Consumer services	462.58	0.99	0.46	-1.02	-1.02	-36.73	0.71 KWD	0.95	10.43
Insurance	1,529.09	0.01	0.69	1.86	1.86	-0.28	0.63 KWD	0.80	8.02
Consumer Disc	1,386.29	-0.45	-0.77	0.08	0.08	3.72	0.14 KWD	0.92	18.74
Energy	1,006.45	-2.64	-3.40	-5.72	-5.72	-29.53	0.21 KWD	0.78	10.76
Technology	628.56	2.01	-1.26	6.67	6.67	-8.09	0.01 KWD	0.76	0.00
Utilities	500.00	0.00	-1.04	-2.56	-2.56	-16.67	0.21 KWD	2.14	14.55



What Move the GCC markets

Oil Prices

Oil prices continued to rise in early Asian trade on Thursday after surging more than 3% in the previous session, driven by record U.S. crude exports and a weaker U.S. dollar. Brent crude futures rose 25 cents, or 0.3%, to \$95.94 a barrel by 0015 GMT. U.S. West Texas Intermediate crude rose 19 cents, or 0.2%, to \$88.10.

Kuwait Market

The market closed down today by - 0.14% at 7,231.08 value traded 38.3 million KD, Premier market value traded reached 31.6 million KD and closed at 8,091.48 down by - 0.14%.

KSA Market

The market closed down today by - 0.76% at 11,709.50.

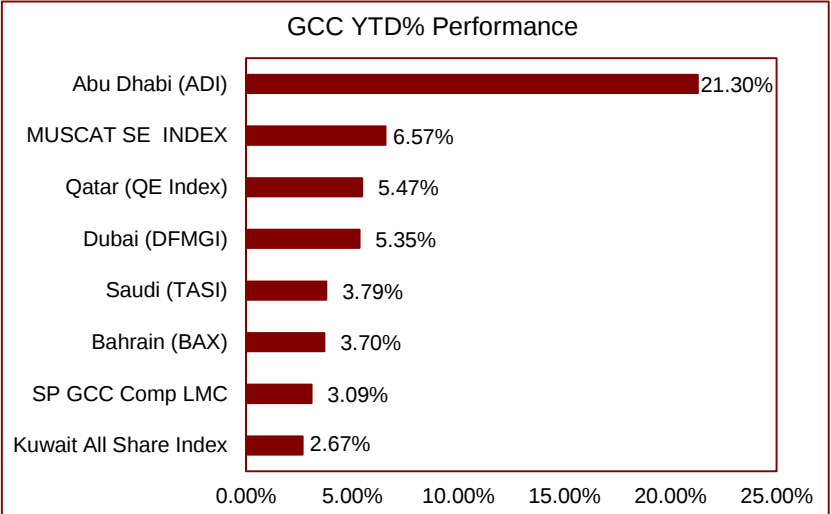


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.055	-0.09	0.00	8.09	8.09	11.11	7.97 KWD	2.03	27.00
KFH	0.801	-0.12	-1.23	-4.76	-4.76	5.90	10.66 KWD	3.30	32.00
Zain	0.597	0.17	0.17	2.05	2.05	0.34	2.58 KWD	2.18	13.08
BOUBYAN BANK	0.811	0.12	0.37	6.01	6.01	13.85	3.03 KWD	3.21	34.00
Agility	0.767	-0.78	3.23	14.82	14.82	-2.60	2.05 KWD	1.31	2.43
Saudi Arabia									
ARAMCO	34.70	-1.14	-3.74	-3.21	-3.21	6.62	7,627.91 SAR	5.86	14.60
SABIC	89.80	-0.88	-2.92	1.13	1.13	-22.59	269.18 SAR	1.49	35.00
STC	40.00	-1.48	2.56	1.65	1.65	-11.03	199.84 SAR	2.78	16.82
AL-RAJHI BANK	87.00	0.58	-0.80	7.01	7.01	-1.83	347.72 SAR	4.25	22.75
NCB	59.80	-6.27	-8.98	-5.23	-5.23	-7.14	267.57 SAR	1.65	16.20
United Arab Emirates									
ETISALAT.AD	25.40	3.67	4.53	8.73	8.73	-19.87	220.89 AED	4.69	23.59
FAB.AD	17.38	-0.46	-2.58	-2.69	-2.69	-6.67	191.12 AED	1.70	13.81
EMIRATES NBD	13.30	1.14	1.53	3.50	3.50	-1.85	83.69 AED	0.95	9.02
DB ISLAMIC BK	5.81	-0.85	-4.60	-2.84	-2.84	7.99	42.07 AED	1.04	8.48
EMAAR PROPERT	6.19	1.64	0.49	6.91	6.91	26.58	49.90 AED	0.78	6.85
Qatar									
QNB	19.33	1.15	-0.41	-2.86	-2.86	-4.26	178.54 QAR	1.70	13.84
INDUSTRIES QAT	15.85	0.32	-5.09	-6.21	-6.21	2.32	95.89 QAR	2.37	10.10
QA ISLAMIC BK	24.20	0.04	-0.41	-2.02	-2.02	32.02	57.18 QAR	2.17	15.52
MASRAF AL RAYA	3.84	1.96	-6.47	-6.70	-6.70	-17.16	35.75 QAR	1.48	24.06
MESAIEED PETRO	2.25	0.31	-5.46	-4.26	-4.26	7.66	28.27 QAR	1.65	14.92
OMAN									
BANK MUSCAT	0.570	-0.35	0.71	-0.70	-0.70	23.66	2.14 OMR	0.98	8.33
OMANTEL	0.852	-4.05	-3.18	-3.18	-3.18	13.30	0.64 OMR	1.10	7.69
BANK DHOFAR	0.140	0.00	-2.10	-1.41	-1.41	11.11	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 down today by -0.14 %The leading sector bottom performance indices today are Energy -2.64 % Industrials -1.08 % Consumer Disc -0.45 % respectively

KSA
Saudi Armco has a negative performance today by -1.14 %, SABIC has a negative performance today by -0.88 %, STC has a negative performance today by -1.48 %, Al Rajhi Bank has a positive performance today by + 0.58 %

U.A.E
ETISALAT .AD has a positive performance today by + 3.67 %, FAB.AD has a negative performance today by -0.46 %



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