

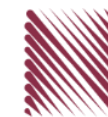


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

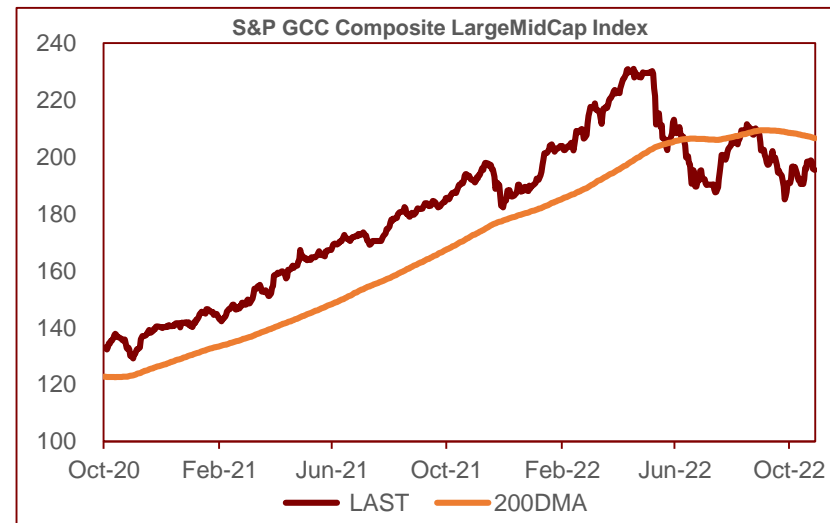
Monday, October 31th 2022





Market Watch Monday, October 31, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,667.80	0.30	-0.36	2.30	2.30	3.42	10,729 SAR	1.90	17.90
Qatar (QE Index)	12,414.41	1.33	1.24	-2.21	-2.21	6.78	627 QAR	1.43	14.29
Dubai (DFMGI)	3,331.76	-0.52	-1.05	-0.22	-0.22	4.25	450 AED	1.31	12.57
Abu Dhabi (ADI)	10,412.25	1.22	1.13	6.78	6.78	22.66	1,435 AED	2.26	23.14
Bahrain (BAX)	1,864.65	0.05	0.05	-0.92	-0.92	3.75	19 BHD	0.00	11.35
MUSCAT SE INDEX	4,365.98	-0.31	-0.80	-3.59	-3.59	5.73	5 OMR	0.00	13.25
SP GCC Comp LMC	195.70	0.66	0.04	2.62	2.62	3.13			
SP UAE PRICE INDEX	143.31	0.96	0.56	3.31	3.31	-2.82			
Developed Markets									
MSCI World Index	2,547.72	-0.52	0.96	7.11	7.11	-21.17			
U.S. (S&P 500)	3,871.98	-0.75	1.70	7.99	7.99	-18.76			
U.K. (FTSE 100)	7,094.53	0.66	0.29	2.91	2.91	-3.93			
Japan (Topix)	1,929.43	1.60	1.25	5.09	5.09	-3.16			
Emerging Markets									
MSCI EM Index	848.16	0.31	-1.32	-3.15	-3.15	-31.16			
China (SSE Composite)	2,893.48	-0.77	-3.00	-4.33	-4.33	-20.50			
India (Sensex)	60,746.59	1.31	1.66	5.78	5.78	4.28			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,318.41	0.49	1.21	2.99	2.99	3.91	47.02 KWD	2.29	21.45
Kuwait Premier Index	8,190.94	0.53	1.23	3.03	3.03	7.22	37.19 KWD	2.45	22.95
Kuwait Main Index	5,489.64	0.30	1.12	2.83	2.83	-6.74	9.83 KWD	1.64	15.78
NIC 50	9,099.17	0.00	1.22	3.02	3.02	6.77	28.60 KWD	2.43	21.95
Kuwait Sector									
Banking	1,791.90	0.66	1.29	2.79	2.79	10.42	30.13 KWD	1.32	23.95
Telecom	1,211.98	-0.13	0.29	4.18	4.18	11.26	3.72 KWD	0.97	13.13
Industrials	1,105.31	0.06	2.06	8.73	8.73	-3.17	3.91 KWD	0.77	10.80
Financial services	1,275.72	0.54	1.66	1.75	1.75	-10.37	3.29 KWD	0.63	14.85
Real estate	1,229.31	0.59	1.08	2.26	2.26	-7.32	2.65 KWD	0.61	25.47
Basic materials	856.39	-0.37	-0.82	-4.99	-4.99	-16.43	0.76 KWD	1.30	9.32
Health care	481.97	0.00	0.00	4.84	4.84	-39.53	0.24 KWD	2.76	10.78
Consumer services	455.01	-0.67	-1.64	-2.64	-2.64	-37.76	0.72 KWD	0.95	10.46
Insurance	1,525.51	-0.03	-0.23	1.62	1.62	-0.51	0.63 KWD	0.80	8.02
Consumer Disc	1,396.72	0.02	0.75	0.83	0.83	4.50	0.14 KWD	0.90	18.54
Energy	1,020.73	-1.04	1.42	-4.38	-4.38	-28.53	0.21 KWD	0.78	11.08
Technology	609.64	-1.06	-3.01	3.46	3.46	-10.85	0.01 KWD	0.74	0.00
Utilities	507.89	1.58	1.58	-1.03	-1.03	-15.35	0.21 KWD	2.17	14.78



What Move the GCC markets

Oil Prices

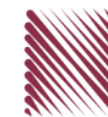
Oil prices fell by more than \$1 on Monday after weaker than expected factory activity data out of China and on concerns that the country's widening COVID-19 curbs will curtail demand. Brent crude futures dropped \$1.17, or 1.2%, to \$94.60 a barrel.

Kuwait Market

The market closed up today by + 0.49% at 7,318.41 value traded 52.1 million KD, Premier market value traded reached 45.4 million KD and closed at 8,190.94 up by + 0.53%.

KSA Market

The market closed up today by + 0.30% at 11,667.80.



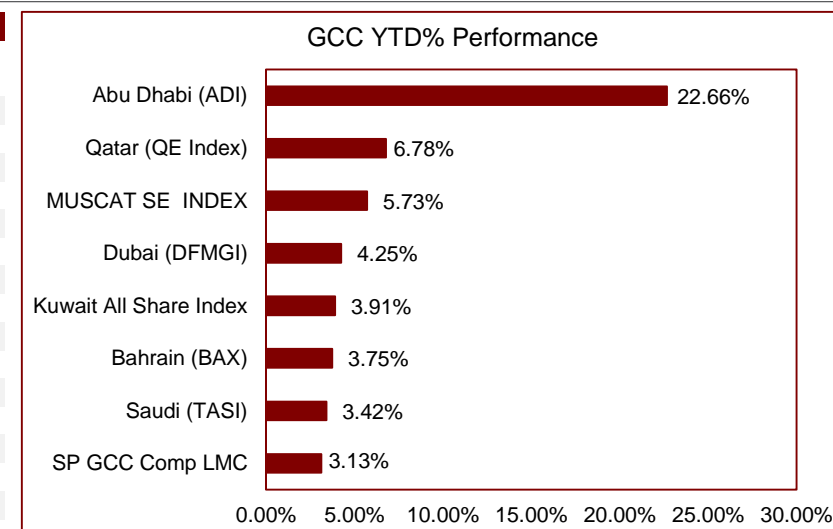
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	1.078	1.32	2.18	10.45	10.45	13.53	8.15 KWD	2.07	27.00
KFH	0.810	0.37	1.12	-3.69	-3.69	7.09	10.79 KWD	3.34	32.00
Zain	0.599	0.17	0.34	2.39	2.39	0.67	2.59 KWD	2.18	13.13
BOUBYAN BANK	0.824	0.98	1.60	7.71	7.71	15.67	3.08 KWD	3.27	34.00
Agility	0.784	-0.51	2.22	17.37	17.37	-0.44	2.10 KWD	1.34	2.48
Saudi Arabia									
ARAMCO	34.90	0.43	0.58	-2.65	-2.65	7.23	7,675.55 SAR	5.90	14.46
SABIC	88.40	0.45	-1.56	-0.45	-0.45	-23.79	265.12 SAR	1.47	35.00
STC	40.40	0.37	1.00	2.67	2.67	-10.14	201.94 SAR	2.81	16.68
AL-RAJHI BANK	85.20	-0.81	-2.07	4.80	4.80	-3.86	340.69 SAR	3.96	22.59
NCB	59.40	2.77	-0.67	-5.86	-5.86	-7.76	265.91 SAR	1.64	14.68
United Arab Emirates									
ETISALAT.AD	25.80	1.57	1.57	10.45	10.45	-18.61	224.38 AED	4.76	23.96
FAB.AD	17.90	3.47	2.99	0.22	0.22	-3.88	197.76 AED	1.76	14.22
EMIRATES NBD	13.25	0.00	-0.38	3.11	3.11	-2.21	83.70 AED	0.95	7.91
DB ISLAMIC BK	5.82	0.17	0.17	-2.68	-2.68	8.18	42.14 AED	1.04	8.50
EMAAR PROPERT	6.06	-0.66	-2.10	4.66	4.66	23.93	49.57 AED	0.78	6.71
Qatar									
QNB	19.94	3.58	3.16	0.20	0.20	-1.24	183.27 QAR	1.76	14.28
INDUSTRIES QAT	15.77	0.64	-0.50	-6.69	-6.69	1.81	94.94 QAR	2.36	10.05
QA ISLAMIC BK	24.39	0.79	0.79	-1.26	-1.26	33.06	57.35 QAR	2.19	15.64
MASRAF AL RAYA	3.84	-0.34	-0.18	-6.87	-6.87	-17.31	35.51 QAR	1.47	24.01
MESAIEED PETRO	2.27	0.00	0.89	-3.40	-3.40	8.61	28.38 QAR	1.66	15.05
OMAN									
BANK MUSCAT	0.572	0.70	0.35	-0.35	-0.35	24.09	2.15 OMR	0.99	8.33
OMANTEL	0.840	-5.41	-1.41	-4.55	-4.55	11.70	0.63 OMR	1.09	7.69
BANK DHOFAR	0.145	3.57	3.57	2.11	2.11	15.08	0.44 QAR	0.62	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-3.70	-3.70	31.98	0.42 QAR	0.73	12.71
OMINVEST	0.330	-0.60	-0.60	-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
19-Oct 22	23.83%	16.90%	0.06%	1.20%	0.37%	5.80%	17.79%	11.66%	5.77%	4.60%
26-Oct 22	23.95%	16.94%	0.06%	1.19%	0.37%	4.76%	17.79%	11.66%	5.80%	5.08%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.49 % The leading sector best performance indices today are Utilities 1.58 % Banking 0.66 % Real estate 0.59 % respectively

KSA

Saudi Armco has a positive performance today by + 0.43 %, SABIC has a positive performance today by + 0.45 %, STC has a positive performance today by + 0.37 %, Al Rajhi Bank has a negative performance today by -0.81 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.57 %, FAB.AD has a positive performance today by + 3.47 %



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