



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , October 4th 2022



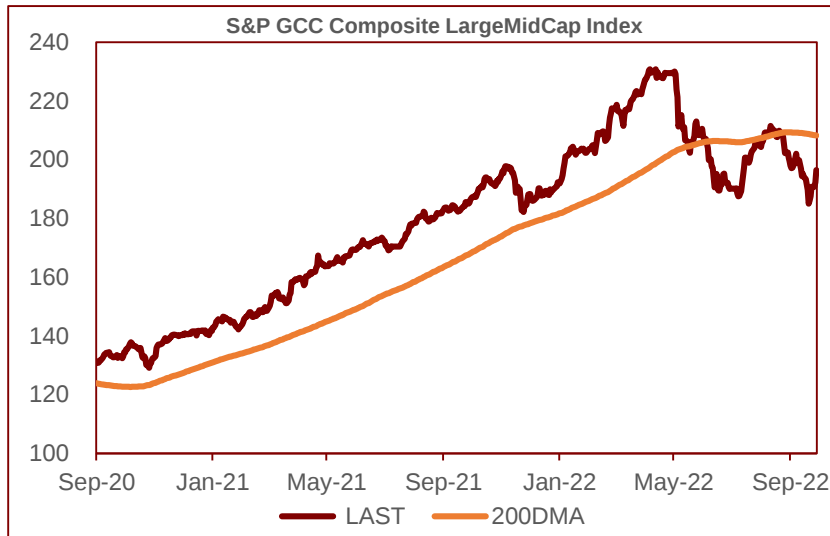


Market Watch

Tuesday, October 4, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,780.41	1.49	3.29	3.29	3.29	4.42	10,975 SAR	1.95	17.06
Qatar (QE Index)	13,032.69	3.47	2.66	2.66	2.66	12.10	659 QAR	1.49	14.91
Dubai (DFMGI)	3,379.42	1.80	1.89	1.21	1.21	5.74	457 AED	1.36	13.23
Abu Dhabi (ADI)	9,909.08	1.49	0.95	1.62	1.62	16.74	1,435 AED	2.19	24.63
Bahrain (BAX)	1,879.73	-0.03	-0.12	-0.12	-0.12	4.59	19 BHD	1.77	11.45
MUSCAT SE INDEX	4,582.43	-0.13	1.19	1.19	1.19	10.97	5 OMR	0.95	13.25
SP GCC Comp LMC	196.50	2.13	2.98	3.04	3.04	3.55			
SP UAE PRICE INDEX	141.48	2.10	1.59	1.99	1.99	-4.06			
Developed Markets									
MSCI World Index	2,511.72	3.37	4.60	5.59	5.59	-22.28			
U.S. (S&P 500)	3,790.93	3.06	3.71	5.72	5.72	-20.46			
U.K. (FTSE 100)	7,086.46	2.57	2.98	2.79	2.79	-4.04			
Japan (Topix)	1,906.89	3.21	2.04	3.86	3.86	-4.29			
Emerging Markets									
MSCI EM Index	893.65	2.00	2.33	2.04	2.04	-27.46			
China (SSE Composite)	3,024.39	0.00	-0.55	0.00	0.00	-16.91			
India (Sensex)	58,065.47	2.25	2.93	1.11	1.11	-0.32			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,186.53	2.93	1.14	1.14	1.14	2.04	46.08 KWD	2.32	21.90
Kuwait Premier Index	8,048.13	3.22	1.24	1.24	1.24	5.35	36.46 KWD	2.49	23.50
Kuwait Main Index	5,377.55	1.76	0.73	0.73	0.73	-8.64	9.62 KWD	1.64	15.84
NIC 50	9,005.15	2.95	1.23	1.23	1.23	5.66	28.60 KWD	2.47	22.50
Kuwait Sector									
Banking	1,761.12	3.18	1.02	1.02	1.02	8.53	29.57 KWD	1.26	24.50
Telecom	1,191.76	2.74	2.44	2.44	2.44	9.40	3.65 KWD	0.96	12.92
Industrials	1,042.25	3.60	2.53	2.53	2.53	-8.69	3.68 KWD	0.85	11.33
Financial services	1,260.96	3.26	0.58	0.58	0.58	-11.41	3.28 KWD	0.64	12.77
Real estate	1,212.93	2.05	0.90	0.90	0.90	-8.56	2.61 KWD	0.63	25.63
Basic materials	879.07	0.34	-2.48	-2.48	-2.48	-14.22	0.78 KWD	1.35	9.60
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	477.65	3.66	2.21	2.21	2.21	-34.67	0.72 KWD	0.91	10.13
Insurance	1,520.36	0.34	1.28	1.28	1.28	-0.85	0.63 KWD	0.76	8.02
Consumer Disc	1,396.12	-0.02	0.79	0.79	0.79	4.45	0.15 KWD	0.95	19.46
Energy	1,088.42	1.58	1.96	1.96	1.96	-23.79	0.23 KWD	0.77	11.59
Technology	588.55	-0.61	-0.12	-0.12	-0.12	-13.94	0.01 KWD	0.71	0.00
Utilities	507.89	0.52	-1.03	-1.03	-1.03	-15.35	0.21 KWD	2.17	14.78



What Move the GCC markets

Oil Prices

Oil prices edged up on Tuesday as expectations that OPEC+ may agree to a large cut in crude output when it meets on Wednesday outweighed concerns about the global economy. Brent crude futures rose 78 cents, or 0.9%, to \$89.64 per barrel after gaining more than 4% in the previous session.

Kuwait Market

The market closed up today by + 2.93% at 7,186.53 value traded 77.6 million KD, Premier market value traded reached 61.7 million KD and closed at 8,048.13 up by + 3.22%.

KSA Market

The market closed up today by + 1.49% at 11,780.41, mainly due decreasing oil prices and negative performance in international equities Markets.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



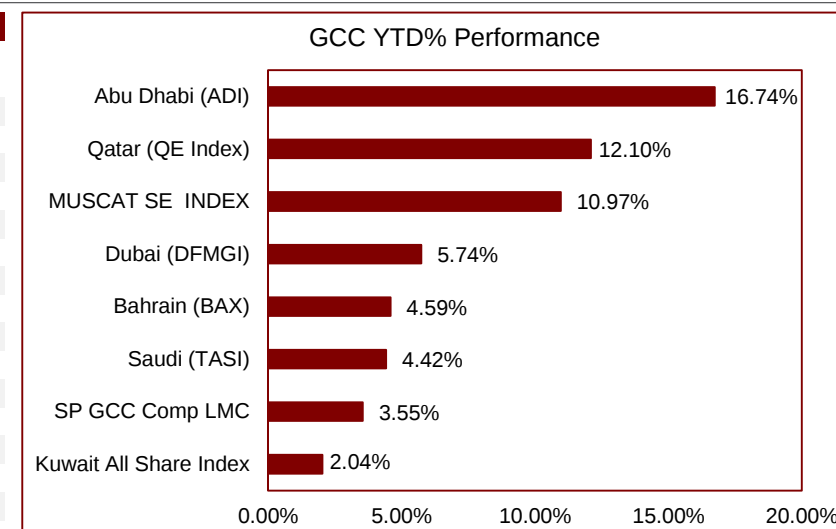
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.010	3.80	3.48	3.48	3.48	6.37	7.62 KWD	1.96	27.00
KFH	0.833	4.39	-0.95	-0.95	-0.95	10.13	11.08 KWD	3.57	32.00
Zain	0.594	1.19	1.54	1.54	1.54	-0.17	2.57 KWD	2.16	13.02
BOUBYAN BANK	0.792	2.86	3.53	3.53	3.53	11.18	2.96 KWD	3.19	34.00
Agility	0.700	4.63	4.79	4.79	4.79	-11.11	1.87 KWD	1.20	2.21
Saudi Arabia									
ARAMCO	36.00	0.70	0.42	0.42	0.42	10.61	7,920.00 SAR	6.08	14.87
SABIC	91.10	1.11	2.59	2.59	2.59	-21.47	273.30 SAR	1.51	35.00
STC	39.50	0.51	0.38	0.38	0.38	-12.14	197.50 SAR	2.75	17.20
AL-RAJHI BANK	84.50	1.81	3.94	3.94	3.94	-4.65	338.00 SAR	4.13	22.67
NCB	65.00	2.36	3.01	3.01	3.01	0.93	291.07 SAR	1.79	16.13
United Arab Emirates									
ETISALAT.AD	24.24	3.15	4.03	3.77	3.77	-23.53	210.80 AED	4.47	22.52
FAB.AD	18.10	1.12	-1.31	1.34	1.34	-2.81	199.95 AED	1.79	13.46
EMIRATES NBD	13.30	3.50	2.70	3.50	3.50	-1.85	84.01 AED	0.98	9.02
DB ISLAMIC BK	6.00	1.69	0.67	0.33	0.33	11.52	43.44 AED	1.10	9.07
EMAAR PROPERT	5.95	2.94	4.20	2.76	2.76	21.68	48.67 AED	0.76	6.59
Qatar									
QNB	20.35	2.78	2.26	2.26	2.26	0.79	187.88 QAR	1.85	15.09
INDUSTRIES QAT	17.50	3.92	3.55	3.55	3.55	12.98	105.83 QAR	2.72	10.61
QA ISLAMIC BK	25.10	2.87	1.62	1.62	1.62	36.93	59.29 QAR	2.35	16.57
MASRAF AL RAYA	4.25	5.96	3.18	3.18	3.18	-8.38	39.52 QAR	1.66	21.27
MESAIEED PETRO	2.47	7.30	5.06	5.06	5.06	18.13	31.01 QAR	1.85	15.59
OMAN									
BANK MUSCAT	0.590	0.00	2.79	2.79	2.79	28.00	2.21 OMR	1.04	8.33
OMANTEL	0.900	1.35	2.27	2.27	2.27	19.68	0.67 OMR	1.17	7.69
BANK DHOFAR	0.150	0.00	5.63	5.63	5.63	19.05	0.45 QAR	0.64	14.93
NAT BANK OF OMAN	0.265	-1.12	-1.85	-1.85	-1.85	34.52	0.43 QAR	0.76	12.71
OMINVEST	0.332	0.00	0.00	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
21-Sept 22	23.65%	16.45%	0.06%	1.23%	0.37%	5.82%	17.74%	11.46%	5.65%	4.01%
28-Sept 22	23.67%	16.45%	0.06%	1.21%	0.37%	5.82%	17.76%	11.72%	5.66%	4.03%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 2.93 %The leading sector best performance indices today are Consumer services 3.66 % Industrials 3.6 % Financial services 3.26 % respectively

KSA

Saudi Armco has a positive performance today by + 0.7 %, SABIC have positive performance today by + 1.10 %, STC has a positive performance today by + 0.51 %, Al Rajhi Bank has a positive performance today by + 1.81 %

U.A.E

ETISALAT .AD has a positive performance today by + 3.15 %, FAB.AD has a positive performance today by + 1.12 %



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