

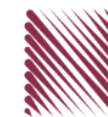


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Thursday , October 6<sup>th</sup> 2022

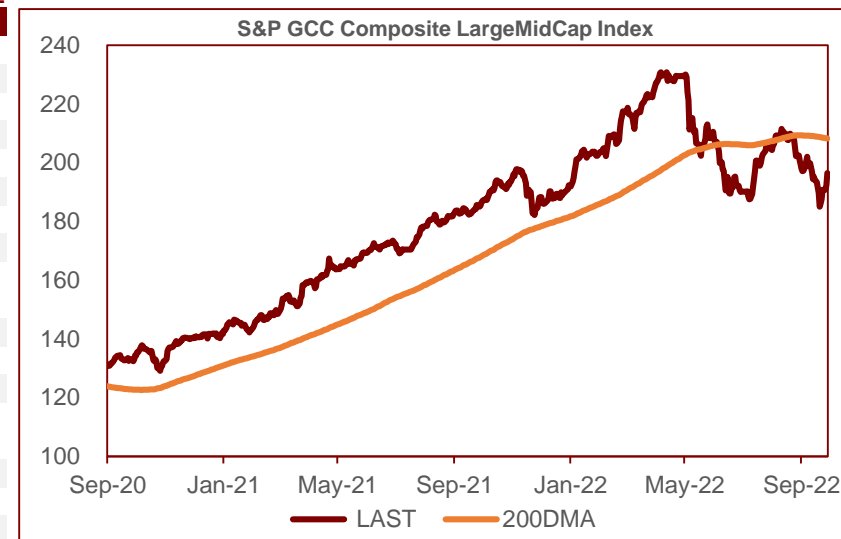




### Market Watch

Thursday, October 6, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,566.45	-0.11	3.09	3.09	3.09	4.22	10,920 SAR	1.90	17.37
Qatar (QE Index)	12,983.29	0.20	2.63	2.63	2.63	12.07	660 QAR	1.51	14.89
Dubai (DFMGI)	3,372.95	-0.07	1.04	0.36	0.36	4.86	456 AED	1.36	13.79
Abu Dhabi (ADI)	9,905.37	-0.05	0.77	1.45	1.45	16.54	1,435 AED	2.17	24.01
Bahrain (BAX)	1,883.03	-0.05	0.06	0.06	0.06	4.77	19 BHD	1.77	11.45
MUSCAT SE INDEX	4,557.30	-0.40	0.64	0.64	0.64	10.36	5 OMR	0.95	13.25
SP GCC Comp LMC	194.31	-0.17	2.86	2.92	2.92	3.43			
SP UAE PRICE INDEX	141.33	-0.06	1.06	1.45	1.45	-4.56			
<b>Developed Markets</b>									
MSCI World Index	2,417.72	-0.87	3.21	4.19	4.19	-23.31			
U.S. (S&P 500)	3,744.52	-1.02	1.78	4.43	4.43	-20.83			
U.K. (FTSE 100)	6,991.09	-0.78	1.68	1.50	1.50	-5.24			
Japan (Topix)	1,906.80	0.50	2.87	4.71	4.71	-3.51			
<b>Emerging Markets</b>									
MSCI EM Index	897.74	0.12	4.27	3.97	3.97	-26.09			
China (SSE Composite)	3,024.39	0.00	-0.55	0.00	0.00	-16.91			
India (Sensex)	58,191.29	0.27	3.21	1.38	1.38	-0.05			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,180.54	-0.95	1.05	1.05	1.05	1.95	46.13 KWD	2.32	21.93
Kuwait Permier Index	8,040.55	-1.09	1.14	1.14	1.14	5.26	36.48 KWD	2.49	23.52
Kuwait Main Index	5,375.45	-0.37	0.69	0.69	0.69	-8.68	9.65 KWD	1.66	15.92
NIC 50	9,004.93	-0.83	1.13	1.13	1.13	5.66	28.60 KWD	2.47	22.52
<b>Kuwait Sector</b>									
Banking	1,766.29	-1.23	1.32	1.32	1.32	8.84	29.70 KWD	1.24	24.52
Telecom	1,181.30	-0.83	1.54	1.54	1.54	8.44	3.63 KWD	0.93	12.90
Industrials	1,024.10	-1.60	0.74	0.74	0.74	-10.28	3.62 KWD	0.77	10.82
Financial services	1,243.00	0.08	-0.86	-0.86	-0.86	-12.67	3.25 KWD	0.62	12.42
Real estate	1,213.12	-0.13	0.91	0.91	0.91	-8.54	2.62 KWD	0.62	26.11
Basic materials	888.57	0.76	-1.42	-1.42	-1.42	-13.29	0.79 KWD	1.34	9.73
Health care	459.73	0.00	0.00	0.00	0.00	-42.32	0.23 KWD	2.51	11.23
Consumer services	477.67	0.58	2.21	2.21	2.21	-34.67	0.72 KWD	0.92	10.12
Insurance	1,561.88	1.16	4.05	4.05	4.05	1.86	0.65 KWD	0.80	8.02
Consumer Disc	1,404.67	0.68	1.41	1.41	1.41	5.09	0.15 KWD	0.95	19.36
Energy	1,042.19	-1.13	-2.37	-2.37	-2.37	-27.03	0.22 KWD	0.76	11.27
Technology	574.72	0.00	-2.47	-2.47	-2.47	-15.96	0.01 KWD	0.70	0.00
Utilities	507.89	0.00	-1.03	-1.03	-1.03	-15.35	0.21 KWD	2.17	14.78



### What Move the GCC markets

#### Oil Prices

Oil prices held near three-week highs on Thursday after OPEC+ agreed to tighten global crude supply with a deal to cut production targets by 2 million barrel per day (bpd), the largest reduction since 2020. Brent crude futures edged down 28 cents, or 0.3%, to \$93.09 per barrel.

#### Kuwait Market

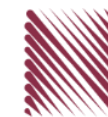
The market closed down today by - 0.95% at 7,180.54 value traded 242.8 million KD, Premier market value traded reached 236.3 million KD and closed at 8,040.55 down by - 1.09%.

#### KSA Market

The market closed down today by - 0.11% at 11,566.45 , mainly due decreasing oil prices and negative performance in international equities Markets.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



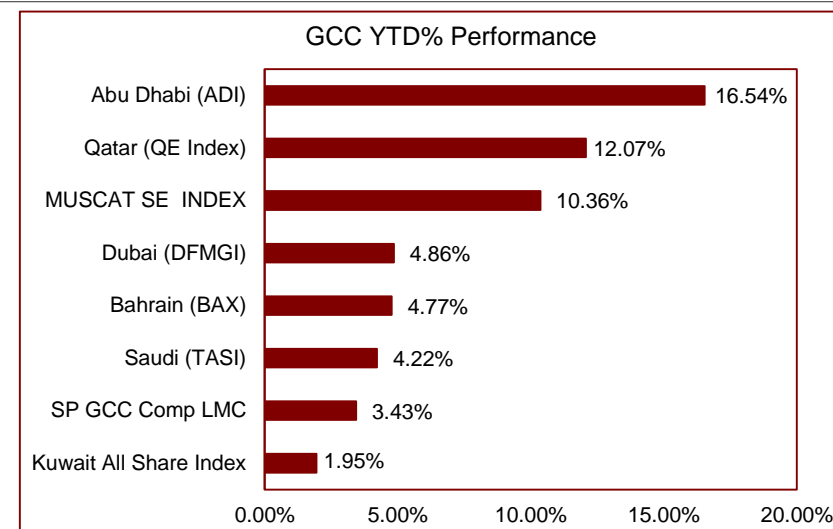
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.026	-0.68	5.12	5.12	5.12	8.05	7.76 KWD	1.99	27.00
KFH	0.824	-3.06	-2.02	-2.02	-2.02	8.94	10.97 KWD	3.53	32.00
Zain	0.590	-0.84	0.85	0.85	0.85	-0.84	2.56 KWD	2.15	12.93
BOUBYAN BANK	0.808	0.75	5.62	5.62	5.62	13.43	3.02 KWD	3.26	34.00
Agility	0.677	-2.87	1.35	1.35	1.35	-14.03	1.81 KWD	1.16	2.14
<b>Saudi Arabia</b>									
ARAMCO	36.00	0.14	0.42	0.42	0.42	10.61	7,920.00 SAR	6.08	14.98
SABIC	94.70	2.49	6.64	6.64	6.64	-18.36	279.00 SAR	1.54	35.00
STC	39.30	-0.13	-0.13	-0.13	-0.13	-12.59	195.00 SAR	2.71	17.20
AL-RAJHI BANK	84.20	-0.71	3.57	3.57	3.57	-4.99	329.60 SAR	4.02	22.99
NCB	64.80	-0.77	2.69	2.69	2.69	0.62	288.83 SAR	1.78	16.46
<b>United Arab Emirates</b>									
ETISALAT.AD	23.92	-0.58	2.66	2.40	2.40	-24.54	210.64 AED	4.47	22.50
FAB.AD	18.00	-0.11	-1.85	0.78	0.78	-3.34	197.75 AED	1.77	13.31
EMIRATES NBD	13.00	1.17	0.39	1.17	1.17	-4.06	83.38 AED	0.98	8.95
DB ISLAMIC BK	5.95	-1.49	-0.17	-0.50	-0.50	10.59	43.44 AED	1.10	9.07
EMAAR PROPERT	5.96	0.34	4.38	2.94	2.94	21.88	48.83 AED	0.77	6.61
<b>Qatar</b>									
QNB	20.50	0.39	3.02	3.02	3.02	1.54	190.35 QAR	1.87	15.28
INDUSTRIES QAT	17.64	0.51	4.38	4.38	4.38	13.88	106.83 QAR	2.75	10.70
QA ISLAMIC BK	25.24	0.36	2.19	2.19	2.19	37.70	59.66 QAR	2.36	16.66
MASRAF AL RAYA	4.16	-0.98	1.00	1.00	1.00	-10.32	38.10 QAR	1.59	20.49
MESAIEED PETRO	2.42	-0.41	2.98	2.98	2.98	15.79	30.29 QAR	1.81	15.21
<b>OMAN</b>									
BANK MUSCAT	0.588	-0.34	2.44	2.44	2.44	27.56	2.21 OMR	1.04	8.33
OMANTEL	0.872	-1.80	-0.91	-0.91	-0.91	15.96	0.65 OMR	1.13	7.69
BANK DHOFAR	0.146	-2.67	2.82	2.82	2.82	15.87	0.44 QAR	0.62	14.93
NAT BANK OF OMAN	0.265	0.00	-1.85	-1.85	-1.85	34.52	0.43 QAR	0.76	12.71
OMINVEST	0.336	0.00	1.20	1.20	1.20	9.80	0.22 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
28-Sept 22	23.67%	16.45%	0.06%	1.21%	0.37%	5.82%	17.76%	11.72%	5.66%	4.03%
5-Oct 22	23.66%	16.51%	0.06%	1.20%	0.37%	5.81%	17.77%	11.58%	5.65%	4.13%

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.95 % The leading sector bottom performance indices today are Industrials -1.6 % Banking -1.23 % Energy -1.13 % respectively

#### KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have positive performance today by + 2.49 %, STC have negative performance today by -0.13 %, Al Rajhi Bank have negative performance today by -0.71 %

#### U.A.E

ETISALAT .AD have negative performance today by -0.58 %, FAB.AD have negative performance today by -0.11 %



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