



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, October 11th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,572.70	-0.63	-1.78	-4.37	-4.37	0.90	2.86	17.97	3.29	10,938.86
Qatar (QE Index)	10,023.13	1.74	-0.39	-2.23	-2.23	-6.16	1.21	10.28	4.86	534.75
Dubai (DFMGI)	4,082.24	0.77	-1.98	-1.95	-1.95	22.37	1.50	10.04	4.32	590.35
Abu Dhabi (ADI)	9,647.76	0.35	-1.11	-1.41	-1.41	-5.52	2.49	15.50	2.26	2,693.78
Bahrain (BAX)	1,939.18	-0.19	-0.60	0.00	0.00	2.32	0.77	9.37	6.00	7.08
Muscat SE INDEX	4,778.48	0.21	0.92	2.34	2.34	-1.63	0.86	10.35	4.61	6.67
SP GCC Comp LMC	173.68	-0.19	-0.19	-2.96	-2.98	-2.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.70	0.00	0.00	2.88	6.22	3.78				

Developed Markets										
MSCI World Index	2,899.50	0.40	1.91	1.62	1.62	11.40				
U.S. (S&P 500)	4,376.95	0.43	1.59	2.07	2.07	14.00	3.87	22.26	2.10	38,613.48
U.K. (FTSE 100)	7,620.03	-0.11	1.67	0.16	0.16	2.26	1.59	10.69	3.83	2,027.01
Japan (topix)	2,307.84	-0.19	1.93	-0.67	-0.67	22.00	1.34	13.74	2.22	834,080.78

Emerging Markets										
MSCI EM Index	956.84	1.30	2.08	0.43	0.43	0.05				
China (SSE Composite)	3,078.96	0.12	-1.01	-1.01	-1.01	-0.33	1.36	12.00		44,025.04
India (Sensex)	66,473.05	0.60	0.72	0.98	0.98	9.26	4.29	22.84	1.21	130,068.72

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,592.43	-0.89	-2.91	-4.27	-4.27	-9.60	1.41	14.96	3.40	43.33
Kuwait Premier Index	7,191.59	-1.04	-2.84	-4.38	-4.38	-11.39	1.46	16.15	2.89	34.62
Kuwait Main Index	5,494.84	-0.32	-3.15	-3.89	-3.89	-1.82	1.00	10.60	4.06	8.71
Kuwait Sector										
Banking	1,594.90	-1.03	-2.91	-5.08	-5.08	-11.09	1.64	16.97	2.84	27.49
Telecom	1,021.22	-0.78	-4.16	-4.76	-4.76	-13.56	1.56	9.58	6.86	3.16
Industrials	878.39	-0.97	-3.00	-4.53	-4.53	-18.58	0.99	15.32	3.16	3.12
Financial Services	1,205.36	-0.58	-2.45	-2.67	-2.67	-4.13	0.97	14.02	4.09	3.85
Real Estate	1,172.45	-1.53	-3.15	-0.27	-0.27	-3.00	0.92	14.66	2.10	2.55
Basic Materials	812.56	-0.16	-2.03	-2.46	-2.46	-6.07	1.42	10.60	9.61	0.46
Health Care	475.11	0.00	0.00	0.00	0.00	2.87	1.72	12.21	1.75	0.24
Consumer Staples	585.00	0.36	-0.29	-1.84	-1.84	21.89	1.34	73.75	2.11	0.18
Insurance	2,221.91	2.57	-0.47	0.03	0.03	43.27	1.21	7.21	4.31	0.87
Consumer Discretionary	1,485.33	-1.07	-3.43	-4.61	-4.61	-0.10				
Energy	950.28	0.20	-1.46	-1.14	-1.14	-16.53	0.75	9.49	5.35	0.20
Technology	611.10	-3.67	-6.14	9.95	9.95	-12.23	0.78			0.01
Utilities	468.42	-1.11	-2.73	-4.30	-4.30	-5.32				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell over 2% on Wednesday as fears of disruption to supplies due to conflict in the Middle East receded a day after top OPEC producer Saudi Arabia pledged to help stabilize the market. Brent crude fell \$1.83, or 2.1%, to settle at \$85.82 a barrel.

Kuwait Market

The market closed down by - 0.89% at 6,592.43 value traded 42.5 million KD, Premier market value reached 33.2 million KD up by - 1.04 % at 7,191.59

KSA Market

The market closed down today by - 0.63% at 10,572.70

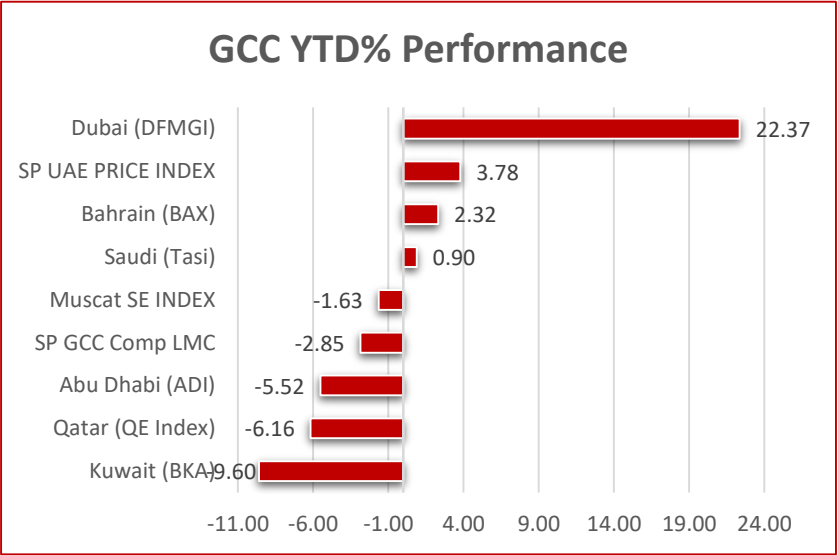


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.840	-1.75	-4.00	-7.28	-7.28	-18.18	1.62	12.69	4.02	6.66
KFH	0.706	-0.56	-2.22	-3.68	-3.68	-5.64	1.80	18.39	2.38	10.42
ZAIN	0.457	-1.08	-3.38	-6.16	-6.16	-18.83	1.60	9.41	7.66	1.98
BOUBYAN BANK	0.595	-1.33	-1.82	-1.49	-1.49	-20.96	2.44	39.38	0.95	2.36
AGILITY	0.519	-0.76	-3.71	-6.99	-6.99	-27.92	0.70	19.27	0.00	1.39
Saudi Arabia										
ARAMCO	33.55	-1.32	0.30	-4.14	-4.14	14.97	5.31	15.98	4.03	8,119.53
SABIC	79.10	-2.10	-4.58	-4.12	-4.12	-11.52	1.34	59.86	4.80	237.31
STC	35.35	-1.67	-4.46	-5.98	-5.98	-3.42	2.33	14.24	4.53	176.76
AL-RAJHI BANK	65.00	-0.15	-2.26	-4.27	-4.27	-13.56	2.52	15.25	2.73	260.01
NCB	32.00	0.00	-3.32	-2.44	-2.44	-15.10	1.12	10.11	4.06	192.01
Abu Dhabi										
ETISALAT.AD	19.36	0.00	-2.32	-5.28	-5.28	-15.31	4.03	17.09	4.13	168.37
FAB.AD	13.44	0.30	-2.33	-1.18	-1.18	-21.40	1.28	11.39	3.87	148.48
EMIRATES NBD	17.70	2.31	-1.94	-0.56	-0.56	36.15	1.14	5.75	3.39	111.80
DB ISLAMIC DB	5.57	-0.36	-3.80	-4.79	-4.79	-2.28	0.96	7.41	5.39	40.33
EMAR.DU	7.78	1.83	-0.13	-3.23	-3.23	32.76	0.97	8.71	3.21	68.77
Qatar										
QNB	15.850	5.32	3.26	2.92	2.92	-11.94	1.36	10.39	3.79	146.37
INDUSTREIS QAT	13.330	0.53	-0.15	-2.77	-2.77	4.06	2.15	15.45	8.25	80.63
QA ISLAMIC BK	18.200	2.08	0.00	-1.94	-1.94	-1.94	1.56	10.87	3.43	43.00
MASRAF AL RAYA	2.120	1.44	-2.75	-4.89	-4.89	-33.14	0.82	19.01	4.72	19.71
MESAIEED PETRO	1.734	-0.23	-2.14	-6.52	-6.52	-18.48	1.31	16.58	6.34	21.78
Oman										
BANK MUSCAT	0.285	-0.70	-0.35	2.52	2.52	3.64	0.96	11.22	5.26	2.14
OMANTEL	1.019	0.00	1.90	2.93	2.93	10.76	1.22	32.96	3.19	0.76
BANK DHOFAR	0.175	0.00	0.00	2.94	2.94	0.00	0.73	20.09	2.86	0.52
NAT BANK OF OMAN	0.314	0.00	0.00	1.62	1.62	8.65	0.78	11.49	2.36	0.51
OMINVEST	0.420	2.44	5.00	6.60	6.60	0.00	0.94	6.17	3.57	0.28

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
27-September-23	24.33%	14.78%	0.07%	2.01%	0.23%	5.20%	17.54%	13.40%	6.06%	4.95%
4-October-23	24.32%	14.88%	0.07%	2.13%	0.23%	5.25%	17.54%	13.39%	6.05%	4.99%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.89 % The leading sector bottom performance indices today are Technology -3.67 % Real estate -1.53 % Utilities -1.11 % respectively.

KSA
Saudi Armco have negative performance today by -1.32 %, SABIC have negative performance today by -2.1%. STC have negative performance today by -1.67 %, Al Rajhi Bank have negative performance today by -0.15 %

U.A.E
ETISALAT .AD flat performance today 0 %, FAB.AD has a positive performance today by + 0.3 %



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