

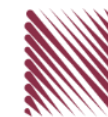


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, October 12th 2023





Thursday, October 12, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,586.22	0.13	-1.66	-4.25	-4.25	1.03	2.87	18.05	3.28	10,991.60
Qatar (QE Index)	10,120.10	0.97	0.57	-1.29	-1.29	-5.25	1.22	10.38	4.82	539.28
Dubai (DFMGI)	3,965.05	-2.27	-4.79	-4.77	-4.77	18.85	1.45	9.74	4.45	576.38
Abu Dhabi (ADI)	9,482.97	-1.14	-2.80	-3.09	-3.09	-7.13	2.44	15.18	2.31	2,630.39
Bahrain (BAX)	1,945.69	0.34	-0.27	0.34	0.34	2.66	0.77	9.42	5.97	7.12
Muscat SE INDEX	4,785.98	0.16	1.08	2.51	2.51	-1.47	0.86	10.38	4.60	6.69
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	2,862.14	-0.76	0.59	0.31	0.31	9.97				
U.S. (S&P 500)	4,327.78	-0.50	0.45	0.93	0.93	12.72	3.89	22.06	2.11	38,335.77
U.K. (FTSE 100)	7,599.60	-0.59	1.40	-0.11	-0.11	1.98	1.58	10.65	3.84	2,020.01
Japan (topix)	2,308.75	-1.44	1.97	-0.63	-0.63	22.05	1.34	13.75	2.22	834,485.29
Emerging Markets										
MSCI EM Index	951.31	-1.18	1.49	-0.15	-0.15	-0.53				
China (SSE Composite)	3,088.10	-0.64	-0.72	-0.72	-0.72	-0.04	1.36	12.00		44,025.04
India (Sensex)	66,282.74	-0.19	0.44	0.69	0.69	8.94	4.28	22.73	1.22	129,826.00

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,622.89	0.46	-2.46	-3.83	-3.83	-9.18	1.40	14.90	3.41	43.17
Kuwait Premier Index	7,239.01	0.66	-2.20	-3.75	-3.75	-10.80	1.45	16.04	2.91	34.50
Kuwait Main Index	5,480.65	-0.26	-3.40	-4.14	-4.14	-2.08	1.00	10.54	4.08	8.67
Kuwait Sector										
Banking	1,605.53	0.67	-2.27	-4.45	-4.45	-10.50	1.35	16.01	2.97	27.40
Telecom	1,028.26	0.69	-3.50	-4.11	-4.11	-12.97	1.56	9.57	6.87	3.16
Industrials	881.20	0.32	-2.69	-4.23	-4.23	-18.32	0.98	15.21	3.18	3.10
Financial Services	1,204.09	-0.11	-2.55	-2.77	-2.77	-4.23	0.96	13.94	4.11	3.84
Real Estate	1,173.19	0.06	-3.09	-0.20	-0.20	-2.94	0.91	14.43	2.13	2.52
Basic Materials	807.25	-0.65	-2.67	-3.10	-3.10	-6.69	1.41	10.51	9.68	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	581.92	-0.53	-0.82	-2.36	-2.36	21.25	1.33	73.30	2.12	0.18
Insurance	2,219.01	-0.13	-0.60	-0.10	-0.10	43.09	1.24	7.39	4.21	0.89
Consumer Discretionary	1,484.78	-0.04	-3.46	-4.65	-4.65	-0.14				
Energy	947.84	-0.26	-1.72	-1.40	-1.40	-16.75	0.75	9.49	5.36	0.20
Technology	640.20	4.76	-1.68	15.18	15.18	-8.05	0.79			0.01
Utilities	468.42	0.00	-2.73	-4.30	-4.30	-5.32				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

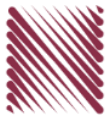
Oil prices rose slightly on Thursday as investors remained on edge about escalating geopolitical tensions in the Middle East. Brent crude futures reached \$86.0 per barrel.

Kuwait Market

The market closed up by + 0.46% at 6,622.89 value traded 45.8 million KD, Premier market value reached 36.8 million KD up by + 0.66 % at 7,239.01

KSA Market

The market closed up today by + 0.13% at 10,586.22

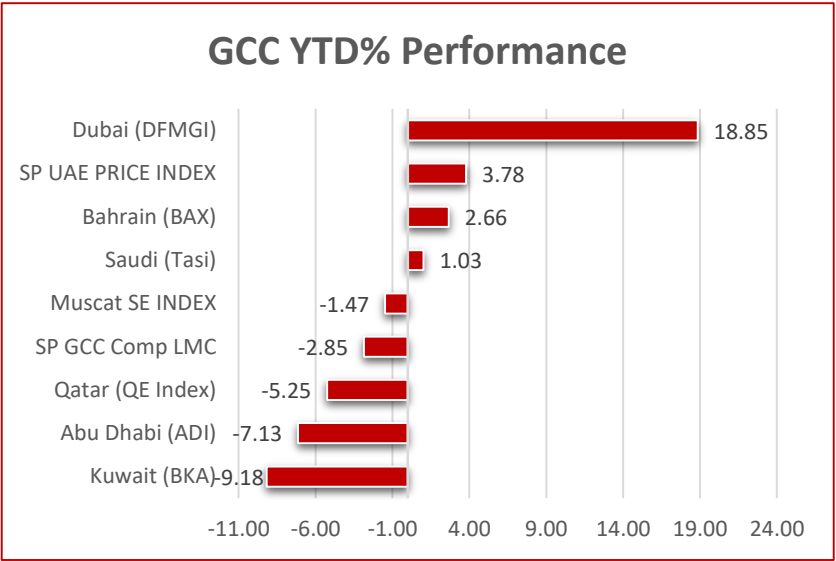


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.854	1.67	-2.40	-5.74	-5.74	-16.82	1.64	12.91	3.96	6.80
KFH	0.709	0.42	-1.80	-3.27	-3.27	-5.24	1.81	18.46	2.37	10.50
ZAIN	0.463	1.31	-2.11	-4.93	-4.93	-17.76	1.62	9.54	7.56	2.01
BOUBYAN BANK	0.600	0.84	-0.99	-0.66	-0.66	-20.30	2.46	39.71	0.94	2.38
AGILITY	0.515	-0.77	-4.45	-7.71	-7.71	-28.47	0.69	19.12	0.00	1.38
Saudi Arabia										
ARAMCO	33.70	0.45	0.75	-3.71	-3.71	15.48	5.33	16.06	4.01	8,155.40
SABIC	80.10	1.26	-3.38	-2.91	-2.91	-10.40	1.36	60.62	4.74	240.30
STC	35.35	0.00	-4.46	-5.98	-5.98	-3.42	2.33	14.24	4.53	176.75
AL-RAJHI BANK	65.00	0.00	-2.26	-4.27	-4.27	-13.56	2.52	15.25	2.73	260.00
NCB	32.05	0.16	-3.17	-2.29	-2.29	-14.96	1.12	10.12	4.05	192.30
Abu Dhabi										
ETISALAT.AD	18.60	0.86	-5.35	-8.22	-8.22	-17.94	3.91	16.56	4.26	163.15
FAB.AD	13.46	-1.93	-4.07	-2.94	-2.94	-22.81	1.25	11.19	3.94	145.83
EMIRATES NBD	17.90	-1.12	-1.94	-0.56	-0.56	36.15	1.14	5.75	3.39	111.80
DB ISLAMIC DB	5.57	-1.26	-5.01	-5.98	-5.98	-3.51	0.95	7.32	5.45	39.82
EMAR.DU	7.67	-5.48	-6.93	-9.83	-9.83	23.72	0.90	8.11	3.45	64.08
Qatar										
QNB	15.960	0.69	3.97	3.64	3.64	-11.33	1.37	10.46	3.76	146.86
INDUSTREIS QAT	13.480	1.13	0.97	-1.68	-1.68	5.23	2.18	15.62	8.16	81.31
QA ISLAMIC BK	18.500	1.65	1.65	-0.32	-0.32	-0.32	1.59	11.05	3.38	43.83
MASRAF AL RAYA	2.128	0.38	-2.39	-4.53	-4.53	-32.89	0.83	19.08	4.70	19.72
MESAIEED PETRO	1.750	0.92	-1.24	-5.66	-5.66	-17.72	1.32	16.73	6.29	21.96
Oman										
BANK MUSCAT	0.287	0.70	0.35	3.24	3.24	4.36	0.96	11.29	5.23	2.15
OMANTEL	1.020	0.10	2.00	3.03	3.03	10.87	1.22	32.99	3.19	0.77
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	0.306	-2.55	-2.55	-0.97	-0.97	5.88	0.76	11.19	2.42	0.50
OMINVEST	0.420	0.00	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
4-October-23	24.32%	14.88%	0.07%	2.13%	0.23%	5.25%	17.54%	13.39%	6.05%	4.99%
11-October-23	24.29%	14.70%	0.07%	2.13%	0.23%	5.28%	17.53%	13.35%	6.05%	4.97%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.46 % The leading sector top performance indices today are Technology + 4.76 % Telecom + 0.69 % Banking + 0.67 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.45 %, SABIC has a positive performance today by +1.26 %. STC has a flat performance today, Al Rajhi Bank has a flat performance today

U.A.E

ETISALAT .AD has a positive performance today + 0.86 %, FAB.AD has a negative performance today by - 1.93 %



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