



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, October 15th 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)	10,542.86	-0.41	-0.41	-4.64	-4.64	0.61	2.88	18.11	3.29	10,902.58
Qatar (QE Index)	10,126.46	0.06	0.06	-1.22	-1.22	-5.19	1.22	10.39	4.81	538.51
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)	1,943.22	-0.13	-0.13	0.21	0.21	2.53	0.77	9.41	5.97	7.10
Muscat SE INDEX	4,760.23	-0.54	-0.54	1.95	1.95	-2.00	0.85	10.31	4.63	6.64
SP GCC Comp LMC	167.26	-0.19	-0.19	-2.96	-2.98	-2.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.61	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
Kuwait										
Kuwait All Share Index	6,568.98	-0.81	-0.81	-4.61	-4.61	-9.92	1.40	14.90	3.41	43.17
Kuwait Premier Index	7,180.93	-0.80	-0.80	-4.52	-4.52	-11.52	1.45	16.04	2.91	34.50
Kuwait Main Index	5,433.66	-0.86	-0.86	-4.96	-4.96	-2.91	1.00	10.54	4.08	8.67
Kuwait Sector										
Banking	1,590.68	-0.92	-0.92	-5.34	-5.34	-11.33	1.35	16.01	2.97	27.40
Telecom	1,026.62	-0.16	-0.16	-4.26	-4.26	-13.11	1.56	9.57	6.87	3.16
Industrials	873.66	-0.86	-0.86	-5.05	-5.05	-19.02	0.98	15.21	3.18	3.10
Financial Services	1,191.15	-1.07	-1.07	-3.81	-3.81	-5.26	0.96	13.94	4.11	3.84
Real Estate	1,170.50	-0.23	-0.23	-0.43	-0.43	-3.16	0.91	14.43	2.13	2.52
Basic Materials	799.90	-0.91	-0.91	-3.98	-3.98	-7.54	1.41	10.51	9.68	0.46
Health Care	469.66	-1.15	-1.15	-1.15	-1.15	1.69	1.72	12.21	1.75	0.24
Consumer Staples	584.67	0.47	0.47	-1.90	-1.90	21.82	1.33	73.30	2.12	0.18
Insurance	2,210.81	-0.37	-0.37	-0.47	-0.47	42.56	1.24	7.39	4.21	0.89
Consumer Discretionary	1,477.44	-0.49	-0.49	-5.12	-5.12	-0.63				
Energy	918.20	-3.13	-3.13	-4.48	-4.48	-19.35	0.75	9.49	5.36	0.20
Technology	582.00	-9.09	-9.09	4.71	4.71	-16.41	0.79			0.01
Utilities	463.16	-1.12	-1.12	-5.38	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose more than 5% on Friday as investors remained on edge about escalating geopolitical tensions in the Middle East. International benchmark Brent crude futures with December expiry climbed \$4.89, or 5.7%, to \$90.89 per barrel.

Kuwait Market

The market closed down by - 0.81% at 6,568.98 value traded 28.5 million KD, Premier market value reached 22.0 million KD down by - 0.80 % at 7,180.93

KSA Market

The market closed down today by - 0.41% at 10,542.86



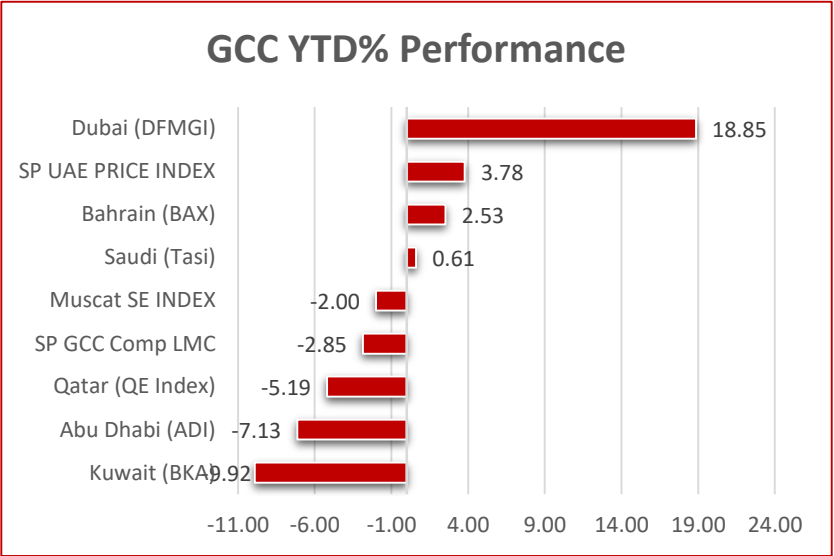
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.849	-0.59	-0.59	-6.29	-6.29	-17.31	1.63	12.83	3.98	6.72
KFH	0.704	-0.71	-0.71	-3.96	-3.96	-5.91	1.80	18.33	2.39	10.38
ZAIN	0.458	-1.08	-1.08	-5.95	-5.95	-18.65	1.60	9.43	7.64	1.98
BOUBYAN BANK	0.592	-1.33	-1.33	-1.99	-1.99	-21.36	2.43	39.18	0.96	2.34
AGILITY	0.512	-0.58	-0.58	-8.24	-8.24	-28.89	0.69	19.01	0.00	1.37
Saudi Arabia										
ARAMCO	33.35	-1.04	-1.04	-4.71	-4.71	14.28	5.28	15.89	4.05	8,070.70
SABIC	80.00	-0.12	-0.12	-3.03	-3.03	-10.51	1.36	60.55	4.75	240.00
STC	35.90	1.56	1.56	-4.52	-4.52	-1.91	2.37	14.46	4.46	179.50
AL-RAJHI BANK	65.00	0.00	0.00	-4.27	-4.27	-13.56	2.52	15.25	2.73	260.00
NCB	31.30	-2.34	-2.34	-4.57	-4.57	-16.95	1.09	9.88	4.15	187.80
Abu Dhabi										
ETISALAT.AD	18.76	0.86	-5.35	-8.22	-8.22	-17.94	3.91	16.56	4.26	163.15
FAB.AD	13.20	-1.93	-4.07	-2.94	-2.94	-22.81	1.25	11.19	3.94	145.83
EMIRATES NBD	17.70	-1.12	-1.94	-0.56	-0.56	36.15	1.14	5.75	3.39	111.80
DB ISLAMIC DB	5.50	-1.26	-5.01	-5.98	-5.98	-3.51	0.95	7.32	5.45	39.82
EMAR.DU	7.25	-5.48	-6.93	-9.83	-9.83	23.72	0.90	8.11	3.45	64.08
Qatar										
QNB	15.800	-1.00	-1.00	2.60	2.60	-12.22	1.36	10.36	3.80	145.94
INDUSTREIS QAT	13.790	2.30	2.30	0.58	0.58	7.65	2.23	15.98	7.98	83.43
QA ISLAMIC BK	18.650	0.81	0.81	0.48	0.48	0.48	1.60	11.14	3.35	44.07
MASRAF AL RAYA	2.103	-1.17	-1.17	-5.65	-5.65	-33.68	0.82	18.86	4.76	19.56
MESAIEED PETRO	1.749	-0.06	-0.06	-5.71	-5.71	-17.77	1.32	16.72	6.29	21.97
Oman										
BANK MUSCAT	0.283	-1.39	-1.39	1.80	1.80	2.91	0.95	11.14	5.30	2.12
OMANTEL	1.030	0.98	0.98	4.04	4.04	11.96	1.23	33.31	3.16	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	0.301	-1.63	-1.63	-2.59	-2.59	4.15	0.75	11.01	2.46	0.49
OMINVEST	0.420	0.00	0.00	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 down today by - 0.81 % The leading sector top performance indices today are Technology – 9.09 % Energy - 3.13 % Health Care – 1.15 % respectively.

KSA

Saudi Armco has a negative performance today by - 1.04 %, SABIC has a negative performance today by - 0.12 %. STC has a positive performance today by + 1.56 %, 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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