

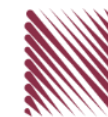


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

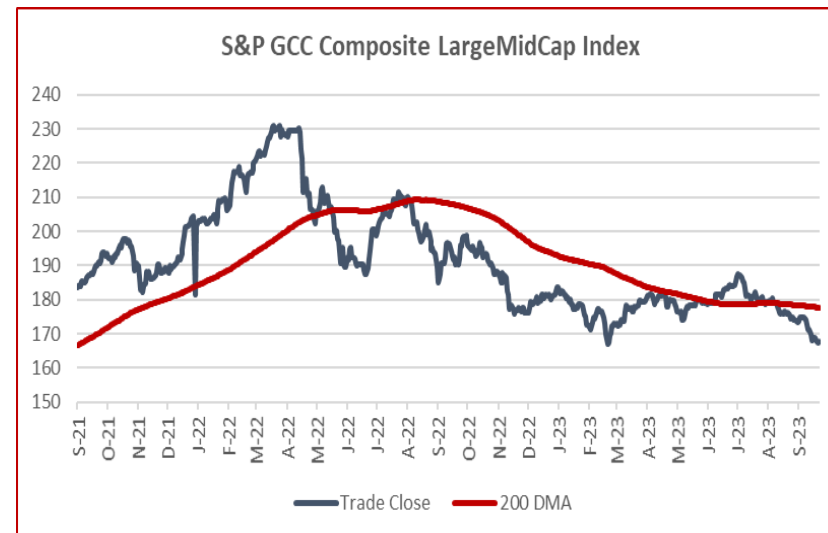
Monday, October 16th 2023





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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)	10,622.12	0.75	0.34	-3.92	-3.92	1.37	2.89	18.06	3.28	10,934.07
Qatar (QE Index)	10,045.60	-0.80	-0.74	-2.01	-2.01	-5.95	1.21	10.31	4.85	534.20
Dubai (DFMGI)	3,943.35	-0.55	-0.55	-5.29	-5.29	18.20	1.45	9.71	4.47	573.94
Abu Dhabi (ADI)	9,479.09	-0.04	-0.04	-3.13	-3.13	-7.17	2.44	15.16	2.31	2,632.31
Bahrain (BAX)	1,943.53	0.02	-0.11	0.23	0.23	2.55	0.77	9.41	5.97	7.10
Muscat SE INDEX	4,714.59	-0.96	-1.49	0.98	0.98	-2.94	0.84	10.18	4.68	6.56
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	2,885.35	0.81	0.81	1.13	1.13	10.86				
U.S. (S&P 500)	4,373.63	1.06	1.06	2.00	2.00	13.91	3.89	22.06	2.11	38,335.77
U.K. (FTSE 100)	7,630.63	0.41	0.41	0.30	0.30	2.40	1.59	10.70	3.83	2,028.39
Japan (topix)	2,273.54	-1.53	-1.53	-2.15	-2.15	20.18	1.32	13.55	2.26	821,741.81
Emerging Markets										
MSCI EM Index	946.21	-0.54	-0.54	-0.69	-0.69	-1.06				
China (SSE Composite)	3,073.81	-0.46	-0.46	-1.18	-1.18	-0.50	1.36	12.00		44,025.04
India (Sensex)	66,166.93	-0.17	-0.17	0.51	0.51	8.75	4.27	22.70	1.23	129,479.94
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,636.15	1.02	0.20	-3.64	-3.64	-9.00	1.39	14.79	3.43	42.84
Kuwait Premier Index	7,252.25	0.99	0.18	-3.57	-3.57	-10.64	1.44	15.90	2.93	34.25
Kuwait Main Index	5,495.12	1.13	0.26	-3.89	-3.89	-1.82	0.99	10.46	4.12	8.60
Kuwait Sector										
Banking	1,612.20	1.35	0.42	-4.06	-4.06	-10.13	1.34	15.91	2.99	27.17
Telecom	1,034.90	0.81	0.65	-3.49	-3.49	-12.40	1.55	9.55	6.88	3.15
Industrials	879.02	0.61	-0.25	-4.46	-4.46	-18.52	0.97	15.10	3.21	3.07
Financial Services	1,199.50	0.70	-0.38	-3.14	-3.14	-4.59	0.95	13.80	4.15	3.80
Real Estate	1,173.97	0.30	0.07	-0.14	-0.14	-2.87	0.91	14.42	2.13	2.51
Basic Materials	800.45	0.07	-0.84	-3.92	-3.92	-7.47	1.39	10.41	9.77	0.45
Health Care	469.66	0.00	-1.15	-1.15	-1.15	1.69	1.70	12.07	1.77	0.23
Consumer Staples	590.14	0.94	1.41	-0.98	-0.98	22.96	1.34	73.60	2.11	0.18
Insurance	2,224.93	0.64	0.27	0.17	0.17	43.47	1.24	7.36	4.22	0.89
Consumer Discretionary	1,469.73	-0.52	-1.01	-5.62	-5.62	-1.15				
Energy	913.21	-0.54	-3.65	-5.00	-5.00	-19.79	0.72	9.17	5.53	0.19
Technology	582.00	0.00	-9.09	4.71	4.71	-16.41	0.72			0.01
Utilities	465.79	0.57	-0.56	-4.84	-4.84	-5.85				



What Move the GCC markets

Oil Prices

Oil prices stabilized on Tuesday after a more than \$1 slide on Monday amid hopes the U.S. would ease sanctions on producer Venezuela and as Washington stepped up efforts to prevent an escalation of the war between Israel and Hamas. Brent crude futures were up 3 cents at \$89.68 a barrel.

Kuwait Market

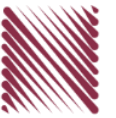
The market closed up by 1.02% at 6,636.15 value traded 37.0 million KD, Premier market value reached 30.8 million KD up by 0.99 % at 7,252.25

KSA Market

The market closed up today by 0.75% at 10,622.12

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



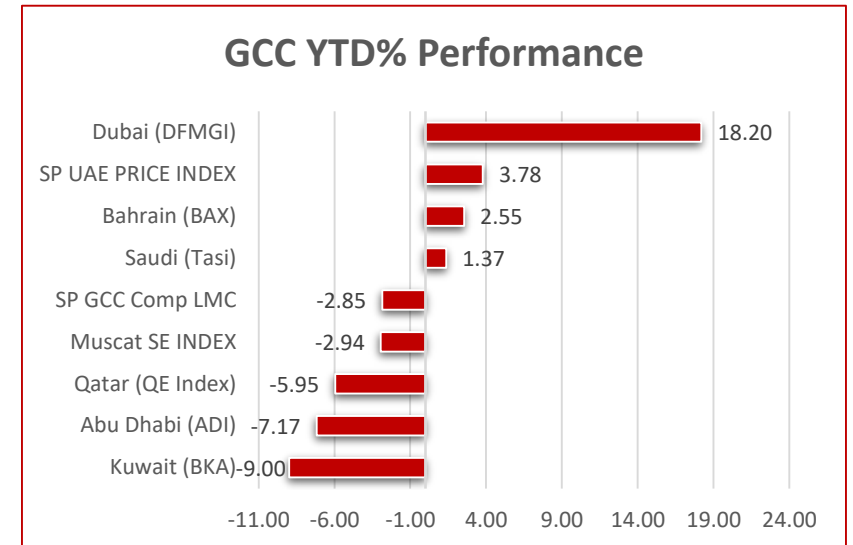
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.865	1.88	1.29	-4.53	-4.53	-15.75	1.66	13.07	3.91	6.91
KFH	0.710	0.85	0.14	-3.14	-3.14	-5.10	1.81	18.49	2.37	10.57
ZAIN	0.462	0.87	-0.22	-5.13	-5.13	-17.94	1.62	9.52	7.58	2.02
BOUBYAN BANK	0.595	0.51	-0.83	-1.49	-1.49	-20.96	2.44	39.38	0.95	2.38
AGILITY	0.516	0.78	0.19	-7.53	-7.53	-28.33	0.70	19.15	0.00	1.39
Saudi Arabia										
ARAMCO	33.40	0.15	-0.89	-4.57	-4.57	14.45	5.29	15.91	4.04	8,083.23
SABIC	78.80	-1.50	-1.62	-4.48	-4.48	-11.86	1.34	59.64	4.82	236.41
STC	36.90	2.79	4.38	-1.86	-1.86	0.82	2.44	14.86	4.34	184.51
AL-RAJHI BANK	65.30	0.46	0.46	-3.83	-3.83	-13.16	2.53	15.32	2.72	261.21
NCB	31.65	1.12	-1.25	-3.51	-3.51	-16.02	1.11	10.00	4.10	189.91
Abu Dhabi										
ETISALAT.AD	18.76	0.00	0.00	-8.22	-8.22	-17.94	3.91	16.56	4.26	163.17
FAB.AD	13.18	-0.15	-0.15	-3.09	-3.09	-22.92	1.25	11.17	3.95	145.83
EMIRATES NBD	17.75	0.28	0.28	-0.28	-0.28	36.54	1.14	5.76	3.38	110.86
DB ISLAMIC DB	5.41	-1.64	-1.64	-7.52	-7.52	-5.09	0.94	7.20	5.55	39.24
EMAR.DU	7.05	-2.76	-2.76	-12.31	-12.31	20.31	0.88	7.89	3.55	63.02
Qatar										
QNB	15.750	-0.32	-1.32	2.27	2.27	-12.50	1.35	10.33	3.81	145.60
INDUSTREIS QAT	13.630	-1.16	1.11	-0.58	-0.58	6.40	2.20	15.79	8.07	82.53
QA ISLAMIC BK	18.400	-1.34	-0.54	-0.86	-0.86	-0.86	1.58	10.99	3.40	43.52
MASRAF AL RAYA	2.098	-0.24	-1.41	-5.88	-5.88	-33.84	0.81	18.81	4.77	19.53
MESAIEED PETRO	1.734	-0.86	-0.91	-6.52	-6.52	-18.48	1.31	16.58	6.34	21.80
Oman										
BANK MUSCAT	0.277	-2.12	-3.48	-0.36	-0.36	0.73	0.93	10.90	5.42	2.06
OMANTEL	1.020	-0.97	0.00	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	0.53
NAT BANK OF OMAN	0.301	0.00	-1.63	-2.59	-2.59	4.15	0.75	11.01	2.46	0.49
OMINVEST	0.410	-2.38	-2.38	4.06	4.06	-2.38	0.91	6.02	3.66	0.27

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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 1.02 %The leading sector best performance indices today are Banking 1.35 % Consumer services 0.94 % Telecom 0.81 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC have negative performance today by -1.5 %, STC has a positive performance today by + 2.79 %, Al Rajhi Bank has a positive performance today by + 0.46 %

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD have negative performance today by - 0.15 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw