



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

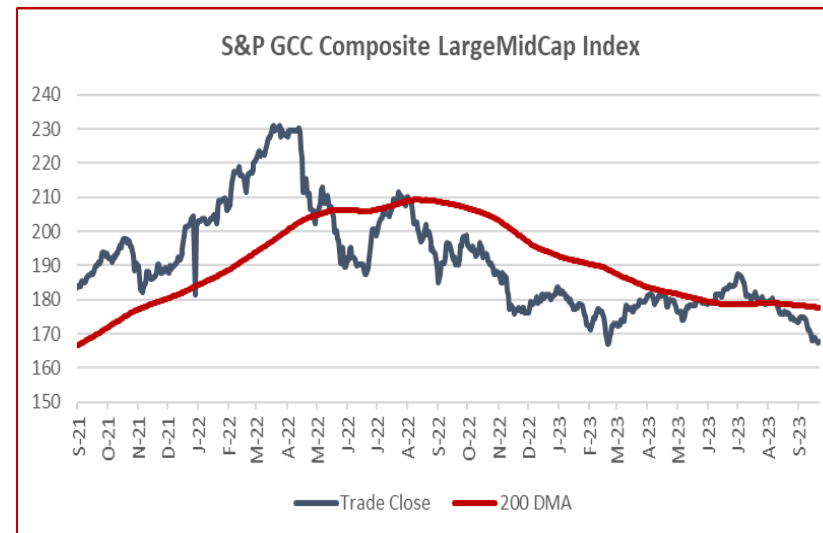
Tuesday, October 17<sup>th</sup> 2023





Tuesday, October 17, 2023

| Market Watch             | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|--------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |        |      |       |                |                       |
| Saudi (Tasi)             | 10,731.40   | 1.03  | 1.37  | -2.94 | -2.94 | 2.41   | 2.92 | 18.25 | 3.25           | 10,979.53             |
| Qatar (QE Index)         | 10,033.94   | -0.12 | -0.85 | -2.13 | -2.13 | -6.06  | 1.21 | 10.29 | 4.86           | 532.77                |
| Dubai (DFMGI)            | 3,937.46    | -0.15 | -0.70 | -5.43 | -5.43 | 18.03  | 1.44 | 9.70  | 4.48           | 571.19                |
| Abu Dhabi (ADI)          | 9,553.59    | 0.79  | 0.74  | -2.37 | -2.37 | -6.44  | 2.46 | 15.32 | 2.28           | 2,651.27              |
| Bahrain (BAX)            | 1,946.02    | 0.13  | 0.02  | 0.36  | 0.36  | 2.68   | 0.77 | 9.44  | 5.96           | 7.10                  |
| Muscat SE INDEX          | 4,723.47    | 0.19  | -1.31 | 1.17  | 1.17  | -2.76  | 0.84 | 10.25 | 4.68           | 6.57                  |
| 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   |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |        |      |       |                |                       |
| MSCI World Index         | 2,888.62    | 0.11  | 0.93  | 1.24  | 1.24  | 10.99  |      |       |                |                       |
| U.S. (S&P 500)           | 4,373.20    | -0.01 | 1.05  | 1.99  | 1.99  | 13.90  | 3.93 | 22.29 | 2.09           | 38,744.70             |
| U.K. (FTSE 100)          | 7,675.21    | 0.58  | 0.99  | 0.88  | 0.88  | 3.00   | 1.60 | 10.76 | 3.80           | 2,039.91              |
| Japan (topix)            | 2,292.08    | 0.82  | -0.72 | -1.35 | -1.35 | 21.16  | 1.34 | 13.66 | 2.24           | 828,592.23            |
| <b>Emerging Markets</b>  |             |       |       |       |       |        |      |       |                |                       |
| MSCI EM Index            | 951.21      | 0.53  | -0.01 | -0.17 | -0.17 | -0.54  |      |       |                |                       |
| China (SSE Composite)    | 3,083.50    | 0.32  | -0.15 | -0.87 | -0.87 | -0.19  | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 66,428.09   | 0.39  | 0.22  | 0.91  | 0.91  | 9.18   | 4.29 | 22.67 | 1.22           | 129,929.06            |
|                          |             |       |       |       |       |        |      |       |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |       |        |      |       |                |                       |
| Kuwait All Share Index   | 6,822.53    | 2.81  | 3.01  | -0.93 | -0.93 | -6.44  | 1.40 | 14.93 | 3.40           | 43.25                 |
| Kuwait Premier Index     | 7,488.02    | 3.25  | 3.44  | -0.44 | -0.44 | -7.73  | 1.45 | 16.04 | 2.91           | 34.55                 |
| Kuwait Main Index        | 5,559.97    | 1.18  | 1.45  | -2.75 | -2.75 | -0.66  | 1.00 | 10.58 | 4.07           | 8.69                  |
| <b>Kuwait Sector</b>     |             |       |       |       |       |        |      |       |                |                       |
| Banking                  | 1,662.33    | 3.11  | 3.54  | -1.07 | -1.07 | -7.33  | 1.36 | 16.11 | 2.95           | 27.50                 |
| Telecom                  | 1,092.32    | 5.55  | 6.23  | 1.87  | 1.87  | -7.54  | 1.57 | 9.63  | 6.82           | 3.18                  |
| Industrials              | 902.00      | 2.61  | 2.36  | -1.97 | -1.97 | -16.39 | 0.98 | 15.18 | 3.19           | 3.09                  |
| Financial Services       | 1,221.42    | 1.83  | 1.44  | -1.37 | -1.37 | -2.85  | 0.96 | 13.89 | 4.12           | 3.82                  |
| Real Estate              | 1,184.23    | 0.87  | 0.94  | 0.74  | 0.74  | -2.03  | 0.91 | 14.46 | 2.13           | 2.52                  |
| Basic Materials          | 801.28      | 0.10  | -0.74 | -3.82 | -3.82 | -7.38  | 1.39 | 10.42 | 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         | 585.00      | -0.87 | 0.53  | -1.84 | -1.84 | 21.89  | 1.35 | 74.48 | 2.09           | 0.18                  |
| Insurance                | 2,224.09    | -0.04 | 0.23  | 0.13  | 0.13  | 43.41  | 1.24 | 7.41  | 4.20           | 0.90                  |
| Consumer Discretionary   | 1,496.75    | 1.84  | 0.81  | -3.88 | -3.88 | 0.67   |      |       |                |                       |
| Energy                   | 907.17      | -0.66 | -4.29 | -5.63 | -5.63 | -20.32 | 0.72 | 9.12  | 5.56           | 0.19                  |
| Technology               | 632.92      | 8.75  | -1.14 | 13.87 | 13.87 | -9.09  | 0.72 |       |                | 0.01                  |
| Utilities                | 473.68      | 1.69  | 1.12  | -3.23 | -3.23 | -4.26  |      |       |                |                       |



### 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 was up at \$89.90 a barrel.

#### Kuwait Market

The market closed up by 2.81% at 6,822.53 value traded 80.8 million KD, Premier market value reached 68.0 million KD up by 3.25 % at 7,488.02

#### KSA Market

The market closed up today by 1.03% at 10,731.40

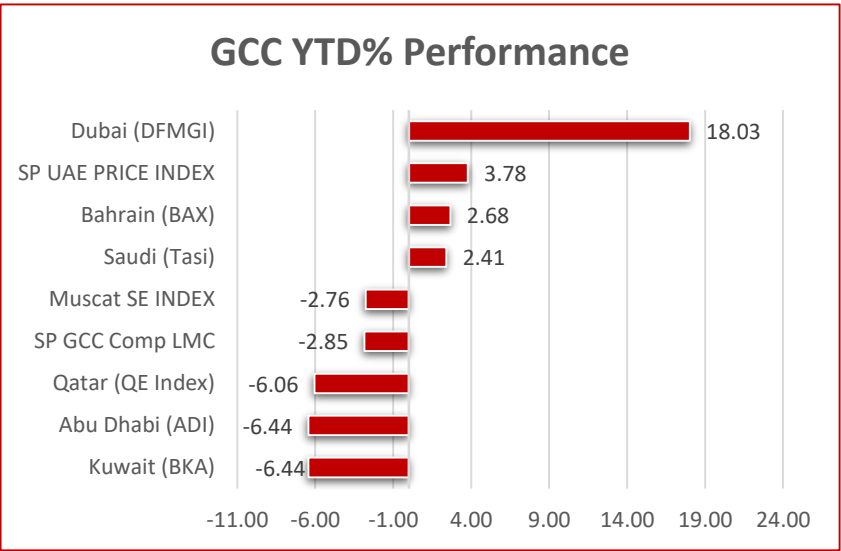


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|------------------|-------------|-------|-------|--------|--------|--------|------|-------|----------------|-----------------------|
| Blue Chip Watch  |             |       |       |        |        |        |      |       |                |                       |
| Kuwait           |             |       |       |        |        |        |      |       |                |                       |
| NBK              | 0.903       | 4.39  | 5.74  | -0.33  | -0.33  | -12.05 | 1.74 | 13.65 | 3.74           | 7.16                  |
| KFH              | 0.732       | 3.10  | 3.24  | -0.14  | -0.14  | -2.16  | 1.87 | 19.06 | 2.30           | 10.81                 |
| ZAIN             | 0.500       | 8.23  | 7.99  | 2.67   | 2.67   | -11.19 | 1.75 | 10.30 | 7.00           | 2.16                  |
| BOUBYAN BANK     | 0.607       | 2.02  | 1.17  | 0.50   | 0.50   | -19.37 | 2.49 | 40.17 | 0.93           | 2.41                  |
| AGILITY          | 0.534       | 3.49  | 3.69  | -4.30  | -4.30  | -25.83 | 0.72 | 19.82 | 0.00           | 1.43                  |
| Saudi Arabia     |             |       |       |        |        |        |      |       |                |                       |
| ARAMCO           | 33.45       | 0.15  | -0.74 | -4.43  | -4.43  | 14.63  | 5.29 | 15.94 | 4.04           | 8,094.90              |
| SABIC            | 79.50       | 0.89  | -0.75 | -3.64  | -3.64  | -11.07 | 1.35 | 60.17 | 4.78           | 238.50                |
| STC              | 37.25       | 0.95  | 5.37  | -0.93  | -0.93  | 1.78   | 2.46 | 15.00 | 4.30           | 186.25                |
| AL-RAJHI BANK    | 66.00       | 1.07  | 1.54  | -2.80  | -2.80  | -12.23 | 2.56 | 15.48 | 2.69           | 264.00                |
| NCB              | 32.50       | 2.69  | 1.40  | -0.91  | -0.91  | -13.77 | 1.14 | 10.26 | 3.99           | 195.00                |
| Abu Dhabi        |             |       |       |        |        |        |      |       |                |                       |
| ETISALAT.AD      | 19.36       | 3.20  | 3.20  | -5.28  | -5.28  | -15.31 | 4.03 | 17.09 | 4.13           | 168.37                |
| FAB.AD           | 13.50       | 2.43  | 2.27  | -0.74  | -0.74  | -21.05 | 1.28 | 11.44 | 3.85           | 149.14                |
| EMIRATES NBD     | 17.80       | 0.28  | 0.56  | 0.00   | 0.00   | 36.92  | 1.14 | 5.78  | 3.37           | 112.43                |
| DB ISLAMIC DB    | 5.41        | 0.00  | -1.64 | -7.52  | -7.52  | -5.09  | 0.94 | 7.20  | 5.55           | 39.17                 |
| EMAR.DU          | 7.09        | 0.57  | -2.21 | -11.82 | -11.82 | 20.99  | 0.88 | 7.93  | 3.53           | 62.67                 |
| Qatar            |             |       |       |        |        |        |      |       |                |                       |
| QNB              | 15.480      | -1.71 | -3.01 | 0.52   | 0.52   | -14.00 | 1.33 | 10.15 | 3.88           | 142.81                |
| INDUSTREIS QAT   | 13.750      | 0.88  | 2.00  | 0.29   | 0.29   | 7.34   | 2.22 | 15.93 | 8.00           | 83.09                 |
| QA ISLAMIC BK    | 18.350      | -0.27 | -0.81 | -1.13  | -1.13  | -1.13  | 1.57 | 10.96 | 3.41           | 43.31                 |
| MASRAF AL RAYA   | 2.098       | 0.00  | -1.41 | -5.88  | -5.88  | -33.84 | 0.81 | 18.81 | 4.77           | 19.49                 |
| MESAIEED PETRO   | 1.739       | 0.29  | -0.63 | -6.25  | -6.25  | -18.24 | 1.32 | 16.63 | 6.33           | 21.82                 |
| Oman             |             |       |       |        |        |        |      |       |                |                       |
| BANK MUSCAT      | 0.277       | 0.00  | -3.48 | -0.36  | -0.36  | 0.73   | 0.93 | 10.90 | 5.42           | 2.08                  |
| OMANTEL          | 1.018       | -0.20 | -0.20 | 2.83   | 2.83   | 10.65  | 1.22 | 32.92 | 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 | 0.310       | 2.99  | 1.31  | 0.32   | 0.32   | 7.27   | 0.77 | 11.34 | 2.39           | 0.50                  |
| OMINVEST         | 0.420       | 2.44  | 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 up today by + 2.81 %The leading sector best performance indices today are Technology + 8.75 % Telecom + 5.55 % Banking + 3.11 % respectively

**KSA**  
Saudi Armco has a positive performance today by + 0.15 %, SABIC has a positive performance today by + 0.89 %, STC has a positive performance today by + 0.95 %, Al Rajhi Bank has a positive performance today by + 1.07 %

**U.A.E**  
ETISALAT .AD positive performance today + 3.20 %, FAB.AD has a positive performance today by + 2.43 %



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