



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, October 19th 2023

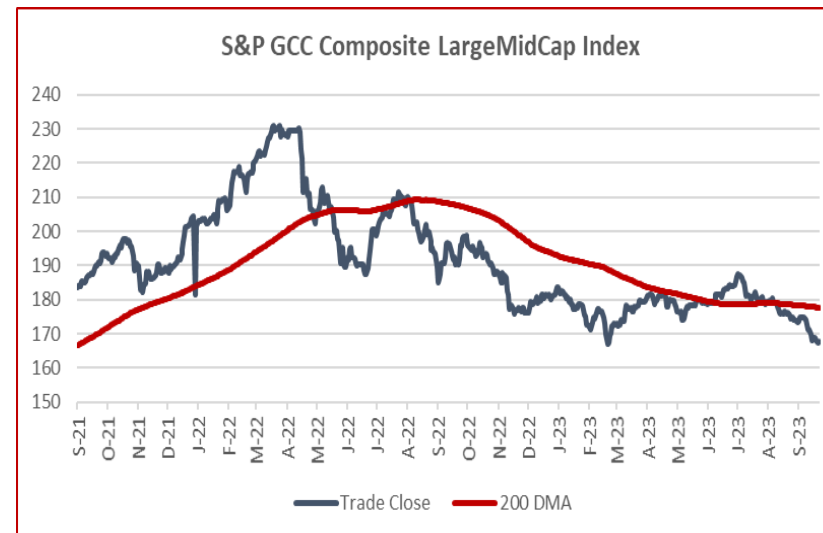




Thursday, October 19, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,654.56	-0.56	0.65	-3.63	-3.63	1.68	2.90	18.20	3.27	10,968.07
Qatar (QE Index)	9,801.75	-1.54	-3.15	-4.39	-4.39	-8.23	1.18	10.01	4.97	522.03
Dubai (DFMGI)	3,751.57	-1.49	-5.38	-9.90	-9.90	12.45	1.36	9.15	4.75	542.01
Abu Dhabi (ADI)	9,306.51	-1.29	-1.86	-4.89	-4.89	-8.86	2.39	14.53	2.36	2,567.20
Bahrain (BAX)	1,944.84	0.20	-0.04	0.29	0.29	2.62	0.77	9.41	5.97	7.11
Muscat SE INDEX	4,681.31	-0.48	-2.19	0.26	0.26	-3.63	0.83	10.08	4.76	6.47
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	2,791.24	-1.18	-2.48	-2.17	-2.17	7.24				
U.S. (S&P 500)	4,224.16	-1.26	-2.39	-1.49	-1.49	10.02	3.80	21.59	2.16	37,387.90
U.K. (FTSE 100)	7,402.14	-1.30	-2.60	-2.71	-2.71	-0.67	1.54	10.38	3.94	1,966.52
Japan (topix)	2,255.65	-0.38	-2.30	-2.92	-2.92	19.24	1.31	13.44	2.27	815,288.49
Emerging Markets										
MSCI EM Index	925.58	-0.56	-2.70	-2.85	-2.85	-3.22				
China (SSE Composite)	2,983.06	-0.74	-3.40	-4.10	-4.10	-3.44	1.36	12.00		44,025.04
India (Sensex)	65,397.62	-0.35	-1.34	-0.65	-0.65	7.49	4.22	22.24	1.24	128,006.72

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,737.56	-0.11	1.73	-2.17	-2.17	-7.60	1.42	14.84	3.36	43.84
Kuwait Premier Index	7,375.79	-0.17	1.89	-1.93	-1.93	-9.12	1.48	16.05	2.85	35.08
Kuwait Main Index	5,543.67	0.12	1.15	-3.04	-3.04	-0.95	1.01	10.63	4.04	8.76
Kuwait Sector										
Banking	1,640.17	0.14	2.16	-2.39	-2.39	-8.57	1.37	15.84	2.93	27.92
Telecom	1,074.76	-1.32	4.52	0.23	0.23	-9.03	1.63	10.00	6.57	3.30
Industrials	887.47	-0.49	0.71	-3.55	-3.55	-17.74	0.99	15.32	3.16	3.12
Financial Services	1,206.37	-0.41	0.19	-2.58	-2.58	-4.05	0.96	13.96	4.10	3.84
Real Estate	1,176.55	-0.41	0.29	0.08	0.08	-2.66	0.91	14.49	2.13	2.52
Basic Materials	789.48	0.11	-2.20	-5.23	-5.23	-8.74	1.38	10.28	9.90	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	582.95	0.71	0.18	-2.19	-2.19	21.46	1.34	73.45	2.11	0.18
Insurance	2,224.06	-0.02	0.23	0.13	0.13	43.41	1.24	7.40	4.20	0.90
Consumer Discretionary	1,490.43	1.03	0.38	-4.29	-4.29	0.24				
Energy	928.34	-2.64	-2.06	-3.42	-3.42	-18.46	0.73	9.31	5.47	0.19
Technology	622.01	14.92	-2.84	11.91	11.91	-10.66	0.77			0.01
Utilities	468.42	0.00	0.00	-4.30	-4.30	-5.32				



What Move the GCC markets

Oil Prices

Oil prices fell about 2% on Thursday as the United States eased sanctions on Venezuela to allow more oil to flow globally, but fears that Israel's military campaign in Gaza may escalate to a regional conflict kept a lid on losses. Brent futures for December were down \$1.80, or 1.97%, to \$89.70 a barrel.

Kuwait Market

The market closed down by – 0.11 % at 6,737.56 value traded 37.2 million KD, Premier market value reached 30.3 million KD down by – 0.17 % at 7,375.79

KSA Market

The market closed down today by – 0.56% at 10,654.56

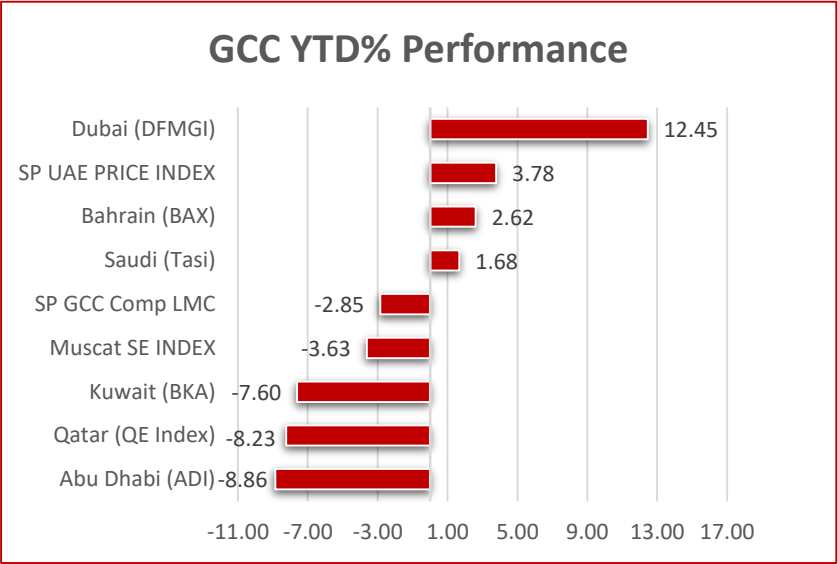


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.892	0.56	4.45	-1.55	-1.55	-13.12	1.69	13.00	3.79	7.07
KFH	0.720	0.00	1.55	-1.77	-1.77	-3.77	1.84	17.78	2.34	10.63
ZAIN	0.489	-2.00	5.62	0.41	0.41	-13.14	1.71	10.07	7.16	2.12
BOUBYAN BANK	0.598	-0.33	-0.33	-0.99	-0.99	-20.57	2.40	36.91	0.95	2.37
AGILITY	0.524	-0.19	1.75	-6.09	-6.09	-27.22	0.71	19.45	0.00	1.40
Saudi Arabia										
ARAMCO	33.50	0.30	-0.59	-4.29	-4.29	14.80	5.30	15.96	4.03	8,107.00
SABIC	79.10	0.25	-1.25	-4.12	-4.12	-11.52	1.34	59.86	4.80	237.30
STC	36.25	-0.28	2.55	-3.59	-3.59	-0.96	2.39	14.60	4.41	181.25
AL-RAJHI BANK	65.40	-1.06	0.62	-3.68	-3.68	-13.03	2.54	15.34	2.71	261.60
NCB	31.70	-1.86	-1.09	-3.35	-3.35	-15.89	1.11	10.01	4.09	190.20
Abu Dhabi										
ETISALAT.AD	19.12	-1.67	0.21	-8.02	-8.02	-17.76	3.92	16.60	4.26	163.50
FAB.AD	13.32	-2.40	-1.52	-4.41	-4.41	-23.98	1.19	10.10	4.00	143.62
EMIRATES NBD	17.30	-3.76	-5.93	-6.46	-6.46	28.08	1.07	5.41	3.60	105.17
DB ISLAMIC DB	5.36	-1.68	-4.18	-9.91	-9.91	-7.54	0.91	7.01	5.69	38.16
EMAR.DU	6.53	-2.30	-12.00	-20.65	-20.65	8.87	0.79	7.14	3.92	56.39
Qatar										
QNB	15.500	-1.40	-2.88	0.65	0.65	-13.89	1.33	10.16	3.87	143.16
INDUSTREIS QAT	13.430	-1.25	-0.37	-2.04	-2.04	4.84	2.17	15.56	8.19	81.25
QA ISLAMIC BK	17.950	0.56	-2.97	-3.29	-3.29	-3.29	1.48	10.54	3.48	42.41
MASRAF AL RAYA	2.014	-2.66	-5.36	-9.65	-9.65	-36.49	0.78	18.06	4.97	18.73
MESAIEED PETRO	1.690	-1.34	-3.43	-8.89	-8.89	-20.55	1.28	16.16	6.51	21.23
Oman										
BANK MUSCAT	0.268	-0.37	-6.62	-3.60	-3.60	-2.55	0.90	10.55	5.60	2.01
OMANTEL	1.010	-0.79	-0.98	2.02	2.02	9.78	1.21	32.66	3.22	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	0.308	0.00	0.65	-0.32	-0.32	6.57	0.77	11.27	2.40	0.50
OMINVEST	0.418	-0.48	-0.48	6.09	6.09	-0.48	0.93	6.14	3.59	0.28

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
11-October-23	24.29%	14.70%	0.07%	2.13%	0.23%	5.28%	17.53%	13.35%	6.05%	4.97%
18-October-23	24.17%	14.61%	0.07%	2.08%	0.23%	5.30%	17.53%	13.32%	6.03%	4.99%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by – 0.11 % The leading sector bottom performance indices today are Energy - 2.64 % Telecom - 1.32 % Financial Services & Real Estate – 0.41 % respectively

KSA

Saudi Armco has a positive performance today by + 0.30 %, SABIC has a positive performance today by + 0.25 %, STC has a negative performance today by – 0.28 %, Al Rajhi Bank has a negative performance today by - 1.06 %

U.A.E

ETISALAT .AD negative performance today - 1.67 %, FAB.AD has a negative performance today by – 2.40 %



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