

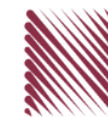


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, October 1st 2023





Sunday, October 1, 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)	11,040.17	-0.14	-0.14	-0.14	-0.14	5.36	3.02	19.02	3.13	11,334.82
Qatar (QE Index)	10,216.15	-0.35	-0.35	-0.35	-0.35	-4.35	1.23	10.51	4.77	542.22
Dubai (DFMGI)	4,163.58	0.23	-0.12	1.98	9.80	24.80	1.53	10.26	4.25	597.50
Abu Dhabi (ADI)	9,785.32	-0.29	-0.65	-0.25	2.46	-4.17	2.53	15.76	2.23	2,756.44
Bahrain (BAX)	1,937.12	-0.10	-0.10	-0.10	-0.10	2.21	0.77	9.36	6.00	7.05
Muscat SE INDEX	4,669.02	0.64	0.64	0.64	0.64	-3.26	0.84	10.17	4.69	6.55
SP GCC Comp LMC	174.67	-0.19	-0.19	-2.96	-2.98	-2.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.73	0.00	0.00	2.88	6.22	3.78				
Developed Markets										
MSCI World Index	2,853.24	-0.09	-0.92	-4.45	-3.83	9.63				
U.S. (S&P 500)	4,288.05	0.59	-0.47	-4.61	-3.39	11.99	3.82	21.91	2.12	38,016.81
U.K. (FTSE 100)	7,608.08	0.08	-0.99	2.27	1.02	2.10	1.58	10.72	3.88	2,026.26
Japan (topix)	2,323.39	-0.94	-2.23	-0.37	1.52	22.82	1.35	13.84	2.21	839,998.25
Emerging Markets										
MSCI EM Index	952.78	0.92	-1.19	-2.81	-3.71	-0.38				
China (SSE Composite)	3,110.48	0.10	-0.70	-0.30	-2.86	0.69	1.36	12.00		44,025.04
India (Sensex)	65,828.41	0.49	-0.27	1.54	1.71	8.20	4.25	22.62	1.22	128,720.05

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,917.72	0.45	0.45	0.45	0.45	-5.13	1.45	15.41	3.29	44.74
Kuwait Premier Index	7,552.28	0.42	0.42	0.42	0.42	-6.94	1.61	16.97	3.13	35.71
Kuwait Main Index	5,749.30	0.57	0.57	0.57	0.57	2.73	1.04	11.03	3.93	9.03
Kuwait Sector										
Banking	1,685.89	0.33	0.33	0.33	0.33	-6.02	1.70	17.60	2.74	28.52
Telecom	1,086.43	1.32	1.32	1.32	1.32	-8.04	1.62	9.98	6.59	3.29
Industrials	924.21	0.45	0.45	0.45	0.45	-14.34	1.02	15.90	3.05	3.23
Financial Services	1,245.66	0.59	0.59	0.59	0.59	-0.92	0.99	14.35	4.01	3.94
Real Estate	1,184.07	0.72	0.72	0.72	0.72	-2.04	0.91	14.47	2.14	2.52
Basic Materials	843.96	1.31	1.31	1.31	1.31	-2.44	1.45	9.30	9.38	0.47
Health Care	475.11	0.00	0.00	0.00	0.00	2.87	1.72	12.21	1.75	0.24
Consumer Staples	594.29	-0.29	-0.29	-0.29	-0.29	23.82	1.37	74.93	2.07	0.18
Insurance	2,227.75	0.30	0.30	0.30	0.30	43.65	1.24	7.39	4.20	0.90
Consumer Discretionary	1,559.00	0.12	0.12	0.12	0.12	4.85				
Energy	926.93	-3.57	-3.57	-3.57	-3.57	-18.58	0.76	9.62	5.28	0.20
Technology	559.45	0.65	0.65	0.65	0.65	-19.64	0.69			0.01
Utilities	492.11	0.54	0.54	0.54	0.54	-0.53				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

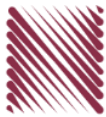
Oil prices settled 1% lower on Friday due to macroeconomic concerns and profit taking, but rose about 30% in the quarter as OPEC+ production cuts squeezed global crude supply. Front-month Brent November futures settled down 7 cents to \$95.31 per barrel.

Kuwait Market

The market closed up by + 0.45% at 6,917.72 value traded 31.8 million KD, Premier market value reached 21.8 million KD up by + 0.42% at 7,522.28

KSA Market

The market closed down today by - 0.14% at 11,040.17

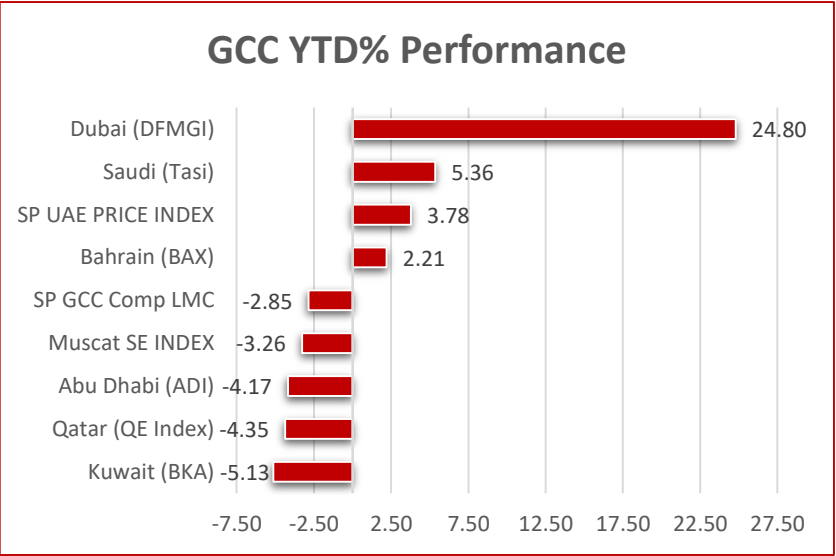


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.905	-0.11	-0.11	-0.11	-0.11	-11.85	1.74	13.68	3.74	7.17
KFH	0.736	0.41	0.41	0.41	0.41	-1.63	1.88	19.17	2.29	10.86
ZAIN	0.492	1.03	1.03	1.03	1.03	-12.61	1.72	10.13	7.11	2.13
BOUBYAN BANK	0.608	0.66	0.66	0.66	0.66	-19.24	2.49	40.24	0.93	2.41
AGILITY	0.561	0.54	0.54	0.54	0.54	-22.08	0.76	20.82	0.00	1.50
Saudi Arabia										
ARAMCO	34.70	-0.86	-0.86	-0.86	-0.86	18.91	5.49	16.53	3.89	8,397.40
SABIC	82.70	0.24	0.24	0.24	0.24	-7.49	1.40	62.59	4.59	248.10
STC	37.55	-0.13	-0.13	-0.13	-0.13	2.60	2.48	15.12	4.26	187.75
AL-RAJHI BANK	67.70	-0.29	-0.29	-0.29	-0.29	-9.97	2.62	15.88	2.62	270.80
NCB	33.10	0.91	0.91	0.91	0.91	-12.18	1.16	10.45	3.92	198.60
Abu Dhabi										
ETISALAT.AD	20.44	-0.97	-0.78	3.02	-8.75	-10.59	4.26	18.04	3.91	177.76
FAB.AD	13.60	0.00	0.29	-0.58	-0.29	-20.47	1.29	11.52	3.82	150.25
EMIRATES NBD	17.80	-0.56	-1.93	8.87	19.87	36.92	1.14	5.78	3.37	112.44
DB ISLAMIC DB	5.85	1.21	-0.85	3.72	6.95	2.63	1.01	7.79	5.13	42.36
EMAR.DU	8.04	4.42	3.88	13.88	25.43	37.20	1.00	9.00	3.11	71.06
Qatar										
QNB	15.250	-0.97	-0.97	-0.97	-0.97	-15.28	1.37	10.22	3.93	140.84
INDUSTREIS QAT	13.720	0.07	0.07	0.07	0.07	7.10	2.22	15.90	8.02	83.00
QA ISLAMIC BK	18.530	-0.16	-0.16	-0.16	-0.16	-0.16	1.59	11.06	3.37	43.78
MASRAF AL RAYA	2.209	-0.90	-0.90	-0.90	-0.90	-30.34	0.86	19.81	4.53	20.54
MESAIEED PETRO	1.839	-0.86	-0.86	-0.86	-0.86	-13.54	1.39	17.58	5.98	23.10
Oman										
BANK MUSCAT	0.279	0.36	0.36	0.36	0.36	1.45	0.94	10.98	5.38	2.09
OMANTEL	1.000	1.01	1.01	1.01	1.01	8.70	1.20	32.34	3.25	0.75
BANK DHOFAR	0.175	2.94	2.94	2.94	2.94	0.00	0.73	20.09	2.86	0.52
NAT BANK OF OMAN	0.310	0.32	0.32	0.32	0.32	7.27	0.77	11.34	2.39	0.50
OMINVEST	0.400	1.52	1.52	1.52	1.52	-4.76	0.89	5.88	3.75	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
20-September-23	24.33%	14.65%	0.07%	1.91%	0.23%	5.13%	17.54%	13.44%	6.08%	4.90%
27-September-23	24.33%	14.78%	0.07%	2.01%	0.23%	5.20%	17.54%	13.40%	6.06%	4.95%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.45 % The leading sector top performance indices today are Telecom + 1.32 %, Basic Material + 1.31 % Real Estate + 0.72 % respectively

KSA

Saudi Armco has a negative performance today by - 0.86%, SABIC has a positive performance today by + 0.24%, STC has a negative performance today by – 0.13 %, Al Rajhi Bank has a negative performance today by – 0.29%

U.A.E

ETISALAT .AD has a negative performance today by - 0.97 %, FAB.AD has a flat performance today



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