



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, October 22<sup>nd</sup> 2023

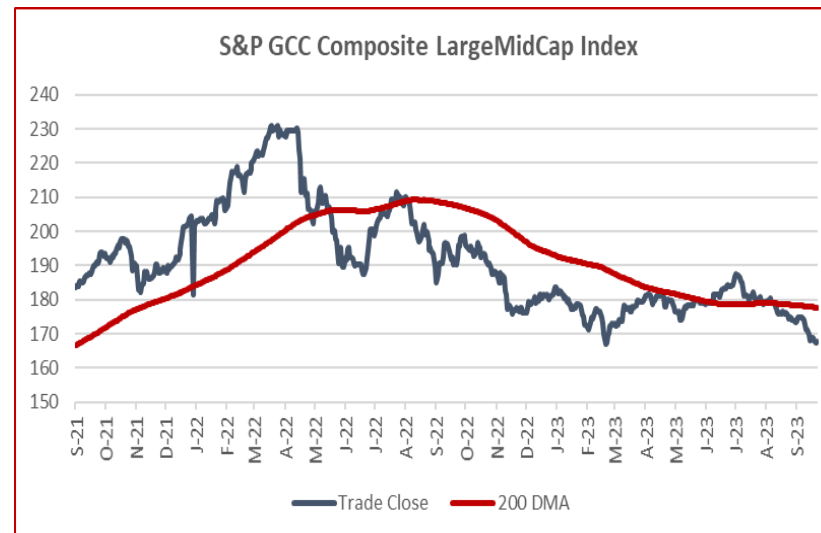




Sunday, October 22, 2023

| 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)             | 10,496.16   | -1.49 | -1.49 | -5.06 | -5.06 | 0.17  | 2.87 | 17.99 | 3.31           | 10,891.09             |
| Qatar (QE Index)         | 9,717.72    | -0.86 | -0.86 | -5.21 | -5.21 | -9.02 | 1.17 | 9.93  | 5.01           | 516.08                |
| 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)            | 1,944.17    | -0.03 | -0.03 | 0.26  | 0.26  | 2.58  | 0.77 | 9.42  | 5.97           | 7.10                  |
| Muscat SE INDEX          | 4,640.11    | -0.88 | -0.88 | -0.62 | -0.62 | -4.47 | 0.82 | 9.92  | 4.83           | 6.37                  |
| SP GCC Comp LMC          | 164.74      | -0.19 | -0.19 | -2.96 | -2.98 | -2.85 | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 128.41      | 0.00  | 0.00  | 2.88  | 6.22  | 3.78  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| 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            |
| <b>Emerging Markets</b>  |             |       |       |       |       |       |      |       |                |                       |
| 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) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |       |        |      |       |                |                       |
| Kuwait All Share Index | 6,707.42    | -0.45 | -0.45 | -2.60 | -2.60 | -8.02  | 1.42 | 14.84 | 3.36           | 43.84                 |
| Kuwait Premier Index   | 7,334.08    | -0.57 | -0.57 | -2.48 | -2.48 | -9.63  | 1.48 | 16.05 | 2.85           | 35.08                 |
| Kuwait Main Index      | 5,543.20    | -0.01 | -0.01 | -3.05 | -3.05 | -0.96  | 1.01 | 10.63 | 4.04           | 8.76                  |
| <b>Kuwait Sector</b>   |             |       |       |       |       |        |      |       |                |                       |
| Banking                | 1,628.22    | -0.73 | -0.73 | -3.10 | -3.10 | -9.24  | 1.37 | 15.84 | 2.93           | 27.92                 |
| Telecom                | 1,077.45    | 0.25  | 0.25  | 0.48  | 0.48  | -8.80  | 1.63 | 10.00 | 6.57           | 3.30                  |
| Industrials            | 885.03      | -0.27 | -0.27 | -3.81 | -3.81 | -17.97 | 0.99 | 15.32 | 3.16           | 3.12                  |
| Financial Services     | 1,201.00    | -0.45 | -0.45 | -3.02 | -3.02 | -4.47  | 0.96 | 13.96 | 4.10           | 3.84                  |
| Real Estate            | 1,176.32    | -0.02 | -0.02 | 0.06  | 0.06  | -2.68  | 0.91 | 14.49 | 2.13           | 2.52                  |
| Basic Materials        | 783.08      | -0.81 | -0.81 | -6.00 | -6.00 | -9.48  | 1.38 | 10.28 | 9.90           | 0.45                  |
| Health Care            | 469.66      | 0.00  | 0.00  | -1.15 | -1.15 | 1.69   | 1.70 | 12.07 | 1.77           | 0.23                  |
| Consumer Staples       | 583.97      | 0.17  | 0.17  | -2.02 | -2.02 | 21.67  | 1.34 | 73.45 | 2.11           | 0.18                  |
| Insurance              | 2,232.53    | 0.38  | 0.38  | 0.51  | 0.51  | 43.96  | 1.24 | 7.40  | 4.20           | 0.90                  |
| Consumer Discretionary | 1,511.03    | 1.38  | 1.38  | -2.96 | -2.96 | 1.63   |      |       |                |                       |
| Energy                 | 949.84      | 2.32  | 2.32  | -1.19 | -1.19 | -16.57 | 0.73 | 9.31  | 5.47           | 0.19                  |
| Technology             | 595.82      | -4.21 | -4.21 | 7.20  | 7.20  | -14.42 | 0.77 |       |                | 0.01                  |
| Utilities              | 463.16      | -1.12 | -1.12 | -5.38 | -5.38 | -6.38  |      |       |                |                       |



### What Move the GCC markets

#### Oil Prices

Oil prices settled lower on Friday after the Islamist group Hamas released two U.S. hostages from Gaza, leading to hopes the Israeli-Palestinian crisis could de-escalate without engulfing the rest of the Middle East region and disrupting oil supplies. Brent crude futures fell 22 cents, or 0.2%, to settle at \$92.16 a barrel.

#### Kuwait Market

The market closed down by – 0.45 % at 6,707.42 value traded 31.1 million KD, Premier market value reached 24.2 million KD down by – 0.57 % at 7,334.08

#### KSA Market

The market closed down today by – 1.49 % at 10,496.16

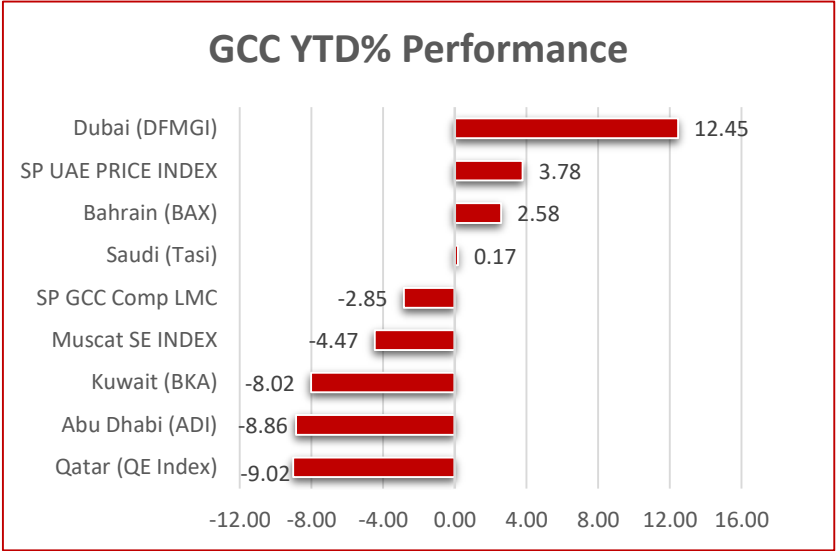


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|------------------|-------------|-------|--------|--------|--------|--------|------|-------|----------------|-----------------------|
| Blue Chip Watch  |             |       |        |        |        |        |      |       |                |                       |
| Kuwait           |             |       |        |        |        |        |      |       |                |                       |
| NBK              | 0.895       | 0.34  | 0.34   | -1.21  | -1.21  | -12.82 | 1.69 | 13.05 | 3.78           | 7.09                  |
| KFH              | 0.710       | -1.39 | -1.39  | -3.14  | -3.14  | -5.10  | 1.82 | 17.54 | 2.37           | 10.47                 |
| ZAIN             | 0.488       | -0.20 | -0.20  | 0.21   | 0.21   | -13.32 | 1.71 | 10.05 | 7.17           | 2.11                  |
| BOUBYAN BANK     | 0.596       | -0.33 | -0.33  | -1.32  | -1.32  | -20.83 | 2.39 | 36.79 | 0.95           | 2.36                  |
| AGILITY          | 0.524       | 0.00  | 0.00   | -6.09  | -6.09  | -27.22 | 0.71 | 19.45 | 0.00           | 1.40                  |
| Saudi Arabia     |             |       |        |        |        |        |      |       |                |                       |
| ARAMCO           | 33.35       | -0.45 | -0.45  | -4.71  | -4.71  | 14.28  | 5.28 | 15.89 | 4.05           | 8,074.36              |
| SABIC            | 78.80       | -0.38 | -0.38  | -4.48  | -4.48  | -11.86 | 1.34 | 59.64 | 4.82           | 236.51                |
| STC              | 36.15       | -0.28 | -0.28  | -3.86  | -3.86  | -1.23  | 2.39 | 14.56 | 4.43           | 180.83                |
| AL-RAJHI BANK    | 64.00       | -2.14 | -2.14  | -5.74  | -5.74  | -14.89 | 2.48 | 15.01 | 2.77           | 256.12                |
| NCB              | 31.50       | -0.63 | -0.63  | -3.96  | -3.96  | -16.42 | 1.10 | 9.95  | 4.12           | 189.09                |
| Abu Dhabi        |             |       |        |        |        |        |      |       |                |                       |
| ETISALAT.AD      | 18.80       | -1.67 | 0.21   | -8.02  | -8.02  | -17.76 | 3.92 | 16.60 | 4.26           | 163.50                |
| FAB.AD           | 13.00       | -2.40 | -1.52  | -4.41  | -4.41  | -23.98 | 1.19 | 10.10 | 4.00           | 143.62                |
| EMIRATES NBD     | 16.65       | -3.76 | -5.93  | -6.46  | -6.46  | 28.08  | 1.07 | 5.41  | 3.60           | 105.17                |
| DB ISLAMIC DB    | 5.27        | -1.68 | -4.18  | -9.91  | -9.91  | -7.54  | 0.91 | 7.01  | 5.69           | 38.16                 |
| EMAR.DU          | 6.38        | -2.30 | -12.00 | -20.65 | -20.65 | 8.87   | 0.79 | 7.14  | 3.92           | 56.39                 |
| Qatar            |             |       |        |        |        |        |      |       |                |                       |
| QNB              | 15.170      | -2.13 | -2.13  | -1.49  | -1.49  | -15.72 | 1.30 | 9.95  | 3.96           | 140.24                |
| INDUSTREIS QAT   | 13.140      | -2.16 | -2.16  | -4.16  | -4.16  | 2.58   | 2.12 | 15.23 | 8.37           | 79.56                 |
| QA ISLAMIC BK    | 18.000      | 0.28  | 0.28   | -3.02  | -3.02  | -3.02  | 1.49 | 10.57 | 3.47           | 42.57                 |
| MASRAF AL RAYA   | 1.999       | -0.74 | -0.74  | -10.32 | -10.32 | -36.96 | 0.78 | 17.93 | 5.00           | 18.61                 |
| MESAIEED PETRO   | 1.674       | -0.95 | -0.95  | -9.76  | -9.76  | -21.30 | 1.27 | 16.01 | 6.57           | 21.05                 |
| Oman             |             |       |        |        |        |        |      |       |                |                       |
| BANK MUSCAT      | 0.257       | -4.10 | -4.10  | -7.55  | -7.55  | -6.55  | 0.86 | 10.11 | 5.84           | 1.93                  |
| OMANTEL          | 1.012       | 0.20  | 0.20   | 2.22   | 2.22   | 10.00  | 1.21 | 32.73 | 3.21           | 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 | 0.305       | -0.97 | -0.97  | -1.29  | -1.29  | 5.54   | 0.76 | 11.16 | 2.43           | 0.49                  |
| OMINVEST         | 0.418       | 0.00  | 0.00   | 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 -0.45 % The leading sector bottom performance indices today are Technology -4.21 % Utilities -1.12 % Basic materials -0.81 % respectively

**KSA**  
Saudi Armco has a negative performance today by -0.45 %, SABIC has a negative performance today by -0.38 %, STC has a negative performance today by -0.28 %, Al Rajhi Bank has negative performance today by -2.14 %

**U.A.E**  
ETISALAT .AD has a negative performance today by -1.67 %, FAB.AD has a negative performance today by -2.40 %



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