



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

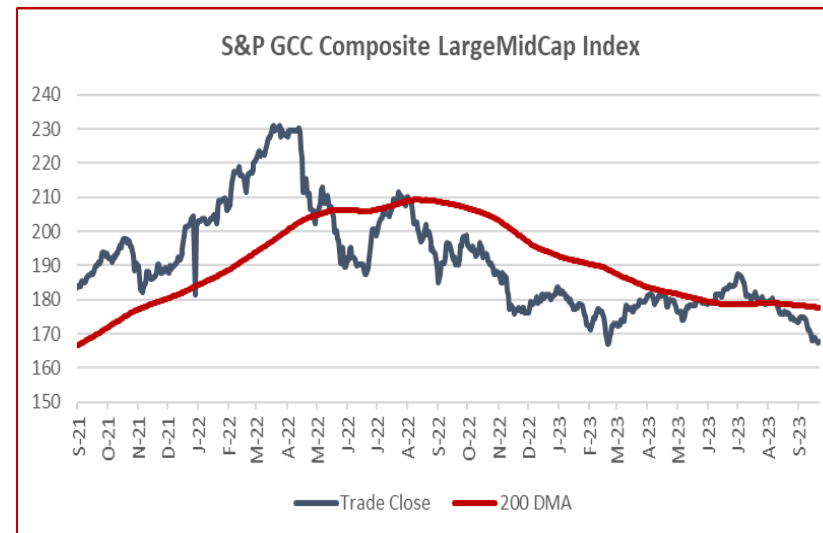
Wednesday, October 25th 2023





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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)	10,504.76	1.20	-1.41	-4.99	-4.99	0.25	2.85	17.80	3.33	10,818.85
Qatar (QE Index)	9,479.67	-0.21	-3.29	-7.53	-7.53	-11.25	1.14	9.82	5.14	504.82
Dubai (DFMGI)	3,841.12	2.66	2.39	-7.74	-7.74	15.14	1.40	9.41	4.62	552.56
Abu Dhabi (ADI)	9,324.88	0.56	0.20	-4.71	-4.71	-8.68	2.39	15.71	2.35	2,575.61
Bahrain (BAX)	1,942.98	0.15	-0.10	0.20	0.20	2.52	0.77	9.37	5.99	7.09
Muscat SE INDEX	4,592.62	-0.69	-1.89	-1.64	-1.64	-5.45	0.81	9.83	4.88	6.31
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	2,772.11	-1.07	-0.69	-2.84	-2.84	6.51				
U.S. (S&P 500)	4,186.77	-1.43	-0.89	-2.36	-2.36	9.04	3.82	21.69	2.15	37,593.06
U.K. (FTSE 100)	7,414.34	0.33	0.16	-2.55	-2.55	-0.50	1.54	10.55	3.94	1,969.11
Japan (topix)	2,254.40	0.61	-0.06	-2.97	-2.97	19.17	1.31	13.50	2.28	814,904.09
Emerging Markets										
MSCI EM Index	920.78	0.02	-0.52	-3.36	-3.36	-3.72				
China (SSE Composite)	2,974.11	0.40	-0.30	-4.38	-4.38	-3.73	1.36	12.00		44,025.04
India (Sensex)	64,049.06	-0.81	-2.06	-2.70	-2.70	5.27	4.14	21.47	1.27	125,403.55
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,592.83	-0.38	-2.15	-4.27	-4.27	-9.59	1.40	14.58	3.41	43.20
Kuwait Premier Index	7,189.59	-0.34	-2.52	-4.40	-4.40	-11.41	1.55	15.96	3.26	34.44
Kuwait Main Index	5,501.99	-0.54	-0.75	-3.77	-3.77	-1.69	1.01	10.61	4.04	8.76
Kuwait Sector										
Banking	1,596.04	-0.47	-2.69	-5.02	-5.02	-11.03	1.64	16.28	2.85	27.43
Telecom	1,039.11	-1.23	-3.32	-3.09	-3.09	-12.05	1.59	9.79	6.71	3.23
Industrials	884.96	-0.24	-0.28	-3.82	-3.82	-17.97	0.99	15.34	3.16	3.12
Financial Services	1,183.71	-0.47	-1.88	-4.41	-4.41	-5.85	0.95	13.75	4.16	3.79
Real Estate	1,165.33	0.22	-0.95	-0.87	-0.87	-3.59	0.90	14.33	2.15	2.49
Basic Materials	768.87	0.51	-2.61	-7.71	-7.71	-11.12	1.33	9.96	10.22	0.43
Health Care	469.66	0.00	0.00	-1.15	-1.15	1.69	1.70	12.07	1.77	0.23
Consumer Staples	585.67	-0.41	0.47	-1.73	-1.73	22.03	1.35	74.19	2.10	0.18
Insurance	2,236.37	-0.27	0.55	0.68	0.68	44.21	1.25	7.46	4.16	0.90
Consumer Discretionary	1,518.22	2.09	1.86	-2.50	-2.50	2.11				
Energy	919.77	0.50	-0.92	-4.32	-4.32	-19.21	0.72	9.16	5.55	0.19
Technology	625.65	6.17	0.59	12.57	12.57	-10.14	0.73			0.01
Utilities	460.53	0.58	-1.68	-5.91	-5.91	-6.91				



What Move the GCC markets

Oil Prices

Oil benchmark Brent held around \$88 on Wednesday as concerns about war escalating in the Middle East offset demand worries stemming from gloomy economic prospects in Europe. Brent crude futures were down 12 cents to \$87.95 a barrel.

Kuwait Market

The market closed down by – 0.38 % at 6,592.83 value traded 40.7 million KD, Premier market value reached 35.8 million KD down by – 0.34 % at 7,189.59

KSA Market

The market closed up today by + 1.20 % at 10,504.76



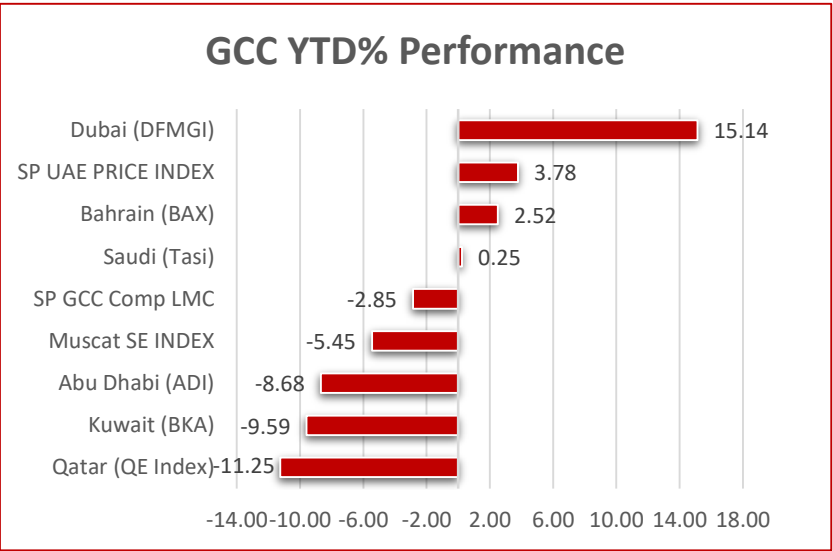
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.880	0.69	-1.35	-2.87	-2.87	-14.29	1.67	12.83	3.84	6.98
KFH	0.689	-1.01	-4.31	-6.00	-6.00	-7.91	1.77	17.02	2.44	10.18
ZAIN	0.468	-1.06	-4.29	-3.90	-3.90	-16.87	1.64	9.64	7.48	2.03
BOUBYAN BANK	0.591	-0.51	-1.17	-2.15	-2.15	-21.50	2.37	36.48	0.96	2.34
AGILITY	0.526	0.00	0.38	-5.73	-5.73	-26.94	0.71	19.52	0.00	1.41
Saudi Arabia										
ARAMCO	33.05	-0.45	-1.34	-5.57	-5.57	13.26	5.23	15.75	4.09	7,998.10
SABIC	77.80	2.37	-1.64	-5.70	-5.70	-12.98	1.32	58.88	4.88	233.40
STC	36.65	1.81	1.10	-2.53	-2.53	0.14	2.42	14.76	4.37	183.25
AL-RAJHI BANK	65.20	0.46	-0.31	-3.98	-3.98	-13.30	2.53	15.29	2.72	260.80
NCB	32.20	0.63	1.58	-1.83	-1.83	-14.56	1.13	10.17	4.03	193.20
Abu Dhabi										
ETISALAT.AD	18.60	0.76	-1.06	-9.00	-9.00	-18.64	3.88	16.42	4.30	161.78
FAB.AD	12.98	0.15	-0.15	-4.56	-4.56	-24.09	1.19	10.09	4.01	143.41
EMIRATES NBD	16.55	3.44	-0.60	-7.02	-7.02	27.31	1.06	5.37	3.63	104.55
DB ISLAMIC DB	5.39	2.28	2.28	-7.86	-7.86	-5.44	0.93	7.17	5.57	39.03
EMAR.DU	6.64	4.24	4.08	-17.41	-17.41	13.31	0.83	7.43	3.77	58.70
Qatar										
QNB	15.190	-0.72	-2.00	-1.36	-1.36	-15.61	1.31	9.96	3.95	140.34
INDUSTREIS QAT	12.600	-2.25	-6.18	-8.10	-8.10	-1.64	1.97	16.33	8.73	76.25
QA ISLAMIC BK	17.400	1.10	-3.06	-6.25	-6.25	-6.25	1.44	10.22	3.59	41.13
MASRAF AL RAYA	1.903	0.37	-5.51	-14.63	-14.63	-39.99	0.74	17.06	5.25	17.70
MESAIEED PETRO	1.582	-1.00	-6.39	-14.72	-14.72	-25.62	1.18	17.36	6.95	19.88
Oman										
BANK MUSCAT	0.254	-0.39	-5.22	-8.63	-8.63	-7.64	0.85	10.00	5.91	1.91
OMANTEL	1.020	-0.49	0.99	3.03	3.03	10.87	1.22	32.99	3.19	0.76
BANK DHOFAR	0.170	-2.86	-2.86	0.00	0.00	-2.86	0.71	19.52	2.94	0.51
NAT BANK OF OMAN	0.304	-0.33	-1.30	-1.62	-1.62	5.19	0.76	11.12	2.43	0.49
OMINVEST	0.400	-4.31	-4.31	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
18-October-23	24.17%	14.61%	0.07%	2.08%	0.23%	5.30%	17.53%	13.32%	6.03%	4.99%
25-October-23	24.25%	14.71%	0.07%	2.06%	0.22%	5.29%	17.53%	13.26%	6.09%	5.05%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.38 % The leading sector bottom performance indices today are Telecom -1.23 % Financial Services -0.47 % Banking -0.47 % respectively

KSA

Saudi Armco has a negative performance today by -0.45 %, SABIC has a positive performance today by + 2.37 %, STC has a positive performance today by + 1.81 %, Al Rajhi Bank has a positive performance today by + 0.46 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.76 %, FAB.AD has a positive performance today by + 0.15 %



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