



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

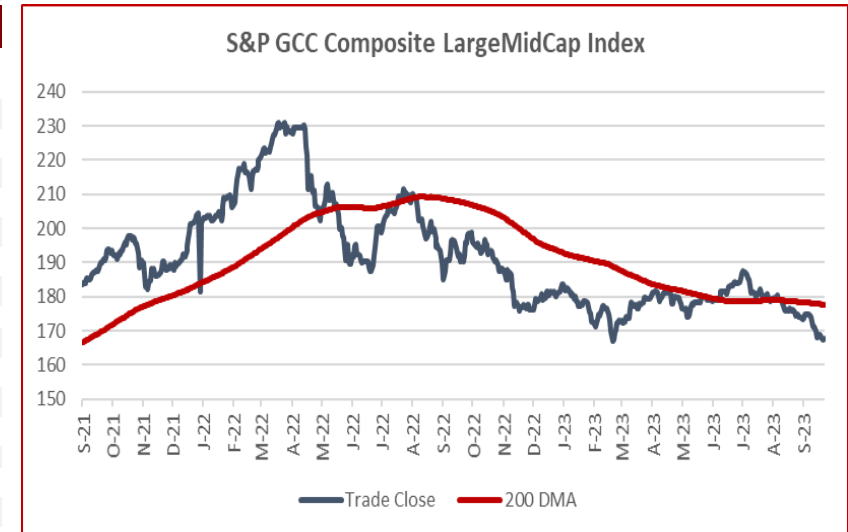
Thursday, October 26<sup>th</sup> 2023





Thursday, October 26, 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)             | 10,408.94   | -0.91 | -2.31 | -5.85  | -5.85  | -0.66  | 2.84 | 17.69 | 3.35           | 10,824.10             |
| Qatar (QE Index)         | 9,319.30    | -1.69 | -4.92 | -9.10  | -9.10  | -12.75 | 1.13 | 9.67  | 5.23           | 495.16                |
| Dubai (DFMGI)            | 3,786.55    | 0.12  | 0.93  | -9.06  | -9.06  | 13.50  | 1.38 | 9.01  | 4.70           | 545.77                |
| Abu Dhabi (ADI)          | 9,236.85    | -0.06 | -0.75 | -5.61  | -5.61  | -9.54  | 2.36 | 15.43 | 2.38           | 2,554.71              |
| Bahrain (BAX)            | 1,941.12    | -0.10 | -0.19 | 0.10   | 0.10   | 2.42   | 0.77 | 9.32  | 5.99           | 7.09                  |
| Muscat SE INDEX          | 4,553.70    | -0.85 | -2.73 | -2.47  | -2.47  | -6.25  | 0.80 | 9.72  | 4.92           | 6.27                  |
| SP GCC Comp LMC          | 162.27      | -0.08 | -2.53 | -7.14  | -7.14  | -9.23  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 126.69      | -0.38 | -1.34 | -11.23 | -11.23 | -7.86  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |        |        |        |      |       |                |                       |
| MSCI World Index         | 2,731.99    | -0.33 | -2.12 | -4.25  | -4.25  | 4.97   |      |       |                |                       |
| U.S. (S&P 500)           | 4,117.37    | -0.48 | -2.53 | -3.98  | -3.98  | 7.24   | 3.71 | 20.70 | 2.21           | 36,393.66             |
| U.K. (FTSE 100)          | 7,291.28    | -0.86 | -1.50 | -4.16  | -4.16  | -2.15  | 1.51 | 10.40 | 4.00           | 1,935.93              |
| Japan (topix)            | 2,254.65    | 1.37  | -0.04 | -2.96  | -2.96  | 19.19  | 1.31 | 13.52 | 2.29           | 815,544.90            |
| <b>Emerging Markets</b>  |             |       |       |        |        |        |      |       |                |                       |
| MSCI EM Index            | 919.78      | 0.97  | -0.63 | -3.46  | -3.46  | -3.83  |      |       |                |                       |
| China (SSE Composite)    | 3,017.78    | 0.99  | 1.16  | -2.98  | -2.98  | -2.31  | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 63,782.80   | 1.01  | -2.47 | -3.11  | -3.11  | 4.84   | 4.12 | 21.37 | 1.27           | 124,853.32            |
|                          |             |       |       |        |        |        |      |       |                |                       |
| 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   | 6,504.31    | -1.34 | -3.46 | -5.55  | -5.55  | -10.80 | 1.38 | 14.15 | 3.47           | 42.50                 |
| Kuwait Premier Index     | 7,080.83    | -1.51 | -4.00 | -5.85  | -5.85  | -12.75 | 1.53 | 15.69 | 3.31           | 33.87                 |
| Kuwait Main Index        | 5,462.30    | -0.72 | -1.47 | -4.46  | -4.46  | -2.40  | 0.99 | 9.94  | 4.10           | 8.63                  |
| <b>Kuwait Sector</b>     |             |       |       |        |        |        |      |       |                |                       |
| Banking                  | 1,572.98    | -1.44 | -4.10 | -6.39  | -6.39  | -12.32 | 1.61 | 15.70 | 2.90           | 26.97                 |
| Telecom                  | 1,029.35    | -0.94 | -4.23 | -4.00  | -4.00  | -12.87 | 1.56 | 9.44  | 6.86           | 3.16                  |
| Industrials              | 870.43      | -1.64 | -1.92 | -5.40  | -5.40  | -19.32 | 0.97 | 15.03 | 3.22           | 3.06                  |
| Financial Services       | 1,169.95    | -1.16 | -3.02 | -5.53  | -5.53  | -6.94  | 0.93 | 13.39 | 4.23           | 3.73                  |
| Real Estate              | 1,147.94    | -1.49 | -2.43 | -2.35  | -2.35  | -5.03  | 0.89 | 14.08 | 2.18           | 2.46                  |
| Basic Materials          | 759.17      | -1.26 | -3.84 | -8.87  | -8.87  | -12.25 | 1.32 | 9.88  | 10.30          | 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         | 585.71      | 0.01  | 0.47  | -1.72  | -1.72  | 22.04  | 1.34 | 74.34 | 2.10           | 0.18                  |
| Insurance                | 2,242.28    | 0.26  | 0.82  | 0.95   | 0.95   | 44.59  | 1.25 | 7.46  | 4.16           | 0.90                  |
| Consumer Discretionary   | 1,489.13    | -1.92 | -0.09 | -4.37  | -4.37  | 0.15   |      |       |                |                       |
| Energy                   | 903.82      | -1.73 | -2.64 | -5.98  | -5.98  | -20.61 | 0.71 | 9.05  | 5.62           | 0.19                  |
| Technology               | 609.64      | -2.56 | -1.99 | 9.68   | 9.68   | -12.44 | 0.75 |       |                | 0.01                  |
| Utilities                | 463.16      | 0.57  | -1.12 | -5.38  | -5.38  | -6.38  |      |       |                |                       |



### What Move the GCC markets

#### Oil Prices

Oil prices fell on Thursday after a rise in U.S. crude stockpiles and a climb in the dollar index, giving up some ground gained a day earlier when prices jumped on fears of a broader conflict in the Middle East. Brent crude futures declined by \$1.21, or 1.3%, to \$88.92 a barrel.

#### Kuwait Market

The market closed down by – 1.34 % at 6,504.31 value traded 54.2 million KD, Premier market value reached 49.1 million KD down by – 1.51 % at 7,080.83

#### KSA Market

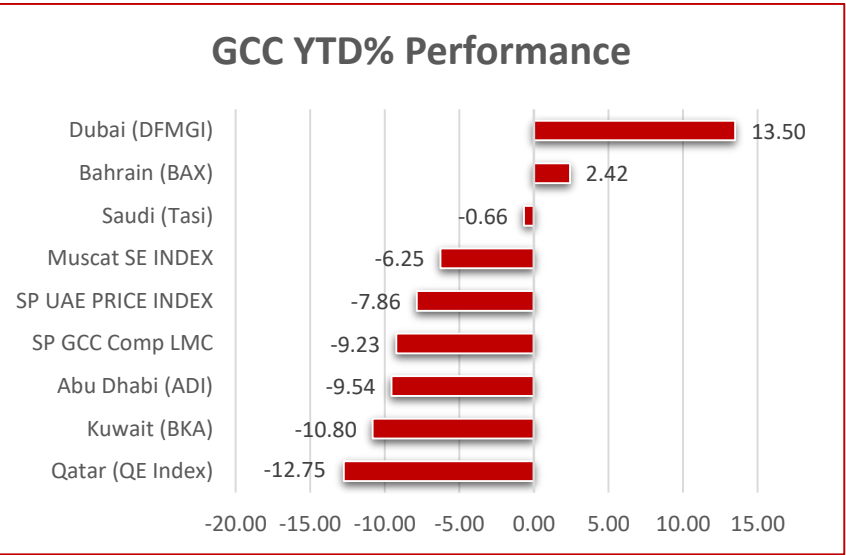
The market closed down today by - 0.91 % at 10,408.94



| Description      | Close Price | DTD   | WTD    | MTD    | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------|-------------|-------|--------|--------|--------|--------|------|-------|----------------|-----------------------|
| Blue Chip Watch  |             |       |        |        |        |        |      |       |                |                       |
| Kuwait           |             |       |        |        |        |        |      |       |                |                       |
| NBK              | 0.866       | -1.59 | -2.91  | -4.42  | -4.42  | -15.65 | 1.64 | 12.62 | 3.90           | 6.87                  |
| KFH              | 0.678       | -1.60 | -5.83  | -7.50  | -7.50  | -9.38  | 1.74 | 16.74 | 2.48           | 10.01                 |
| ZAIN             | 0.461       | -1.50 | -5.73  | -5.34  | -5.34  | -18.12 | 1.61 | 9.50  | 7.59           | 1.99                  |
| BOUBYAN BANK     | 0.588       | -0.51 | -1.67  | -2.65  | -2.65  | -21.89 | 2.36 | 36.30 | 0.96           | 2.33                  |
| AGILITY          | 0.513       | -2.47 | -2.10  | -8.06  | -8.06  | -28.75 | 0.69 | 19.04 | 0.00           | 1.37                  |
| Saudi Arabia     |             |       |        |        |        |        |      |       |                |                       |
| ARAMCO           | 33.20       | 0.45  | -0.90  | -5.14  | -5.14  | 13.77  | 5.26 | 15.82 | 4.07           | 8,034.40              |
| SABIC            | 76.70       | -1.41 | -3.03  | -7.03  | -7.03  | -14.21 | 1.30 | 58.05 | 4.95           | 230.10                |
| STC              | 36.05       | -1.64 | -0.55  | -4.12  | -4.12  | -1.50  | 2.38 | 14.52 | 4.44           | 180.25                |
| AL-RAJHI BANK    | 64.20       | -1.53 | -1.83  | -5.45  | -5.45  | -14.63 | 2.49 | 15.06 | 2.76           | 256.80                |
| NCB              | 31.80       | -1.24 | 0.32   | -3.05  | -3.05  | -15.63 | 1.11 | 10.04 | 4.08           | 190.80                |
| Abu Dhabi        |             |       |        |        |        |        |      |       |                |                       |
| ETISALAT.AD      | 17.86       | 0.78  | -4.26  | -11.94 | -11.94 | -21.26 | 3.75 | 15.89 | 4.44           | 156.54                |
| FAB.AD           | 12.76       | -2.51 | -4.31  | -8.53  | -8.53  | -27.25 | 1.14 | 9.67  | 4.18           | 137.43                |
| EMIRATES NBD     | 16.00       | 2.81  | -1.20  | -7.58  | -7.58  | 26.54  | 0.99 | 4.97  | 3.65           | 103.91                |
| DB ISLAMIC DB    | 5.31        | -1.69 | -0.95  | -10.77 | -10.77 | -8.42  | 0.90 | 6.95  | 5.75           | 37.80                 |
| EMAR.DU          | 6.45        | -2.02 | -0.94  | -21.39 | -21.39 | 7.85   | 0.79 | 7.07  | 3.96           | 55.86                 |
| Qatar            |             |       |        |        |        |        |      |       |                |                       |
| QNB              | 14.800      | -2.57 | -4.52  | -3.90  | -3.90  | -17.78 | 1.27 | 9.70  | 4.05           | 136.70                |
| INDUSTREIS QAT   | 12.700      | 0.79  | -5.44  | -7.37  | -7.37  | -0.86  | 1.99 | 16.46 | 8.66           | 76.84                 |
| QA ISLAMIC BK    | 17.020      | -2.18 | -5.18  | -8.30  | -8.30  | -8.30  | 1.41 | 10.00 | 3.67           | 40.22                 |
| MASRAF AL RAYA   | 1.895       | -0.42 | -5.91  | -14.98 | -14.98 | -40.24 | 0.74 | 17.04 | 5.28           | 17.62                 |
| MESAIEED PETRO   | 1.502       | -5.06 | -11.12 | -19.03 | -19.03 | -29.38 | 1.12 | 16.48 | 7.32           | 18.87                 |
| Oman             |             |       |        |        |        |        |      |       |                |                       |
| BANK MUSCAT      | 0.254       | 0.00  | -5.22  | -8.63  | -8.63  | -7.64  | 0.85 | 9.90  | 5.91           | 1.91                  |
| OMANTEL          | 1.020       | 0.00  | 0.99   | 3.03   | 3.03   | 10.87  | 1.22 | 32.99 | 3.19           | 0.77                  |
| BANK DHOFAR      | 0.160       | -5.88 | -8.57  | -5.88  | -5.88  | -8.57  | 0.67 | 18.37 | 3.13           | 0.48                  |
| NAT BANK OF OMAN | 0.302       | -0.66 | -1.95  | -2.27  | -2.27  | 4.50   | 0.75 | 11.05 | 2.45           | 0.49                  |
| OMINVEST         | 0.418       | 4.50  | 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 |
| 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 -1.34 % The leading sector bottom performance indices today are Technology -2.56 % Consumer Discretionary -1.92 % Energy -1.73 % respectively

**KSA**  
Saudi Armco has a positive performance today by + 0.45 %, SABIC has a negative performance today by - 1.41 %, STC has a negative performance today by - 1.64 %, Al Rajhi Bank has a negative performance today by - 1.53 %

**U.A.E**  
ETISALAT .AD has a positive performance today by + 0.78 %, FAB.AD has a negative performance today by - 2.51 %



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