

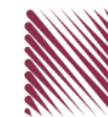


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, October 29th 2023

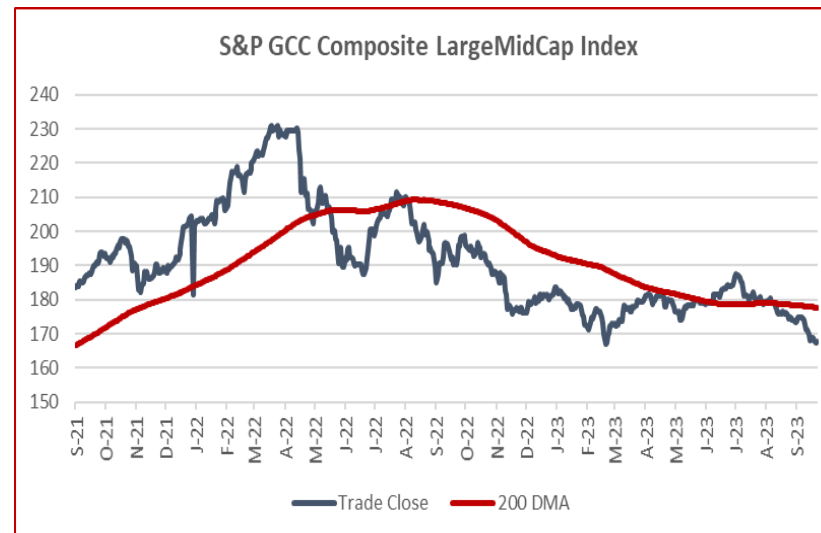




Sunday, October 29, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,482.85	0.71	0.71	-5.18	-5.18	0.04	2.87	17.85	3.34	10,795.06
Qatar (QE Index)	9,359.51	0.43	0.43	-8.71	-8.71	-12.37	1.13	9.67	5.21	494.73
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)	1,939.04	-0.11	-0.11	0.00	0.00	2.31	0.77	9.32	6.00	7.08
Muscat SE INDEX	4,551.81	-0.04	-0.04	-2.51	-2.51	-6.29	0.80	9.61	4.92	6.27
SP GCC Comp LMC	162.68	0.25	0.25	-6.90	-6.90	-9.00	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	126.69	0.00	0.00	-11.23	-11.23	-7.86				
Developed Markets										
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
Emerging Markets										
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)
Kuwait										
Kuwait All Share Index	6,362.44	-2.18	-2.18	-7.61	-7.61	-12.75	1.38	14.15	3.47	42.50
Kuwait Premier Index	6,904.75	-2.49	-2.49	-8.19	-8.19	-14.92	1.53	15.69	3.31	33.87
Kuwait Main Index	5,403.65	-1.07	-1.07	-5.49	-5.49	-3.45	0.99	9.94	4.10	8.63
Kuwait Sector										
Banking	1,529.72	-2.75	-2.75	-8.96	-8.96	-14.73	1.61	15.70	2.90	26.97
Telecom	1,011.62	-1.72	-1.72	-5.66	-5.66	-14.38	1.56	9.44	6.86	3.16
Industrials	863.41	-0.81	-0.81	-6.16	-6.16	-19.97	0.97	15.03	3.22	3.06
Financial Services	1,146.92	-1.97	-1.97	-7.39	-7.39	-8.77	0.93	13.39	4.23	3.73
Real Estate	1,133.75	-1.24	-1.24	-3.56	-3.56	-6.20	0.89	14.08	2.18	2.46
Basic Materials	753.37	-0.76	-0.76	-9.57	-9.57	-12.92	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	586.03	0.05	0.05	-1.67	-1.67	22.10	1.34	74.34	2.10	0.18
Insurance	2,252.96	0.48	0.48	1.43	1.43	45.28	1.25	7.46	4.16	0.90
Consumer Discretionary	1,460.26	-1.94	-1.94	-6.22	-6.22	-1.79				
Energy	908.84	0.56	0.56	-5.45	-5.45	-20.17	0.71	9.05	5.62	0.19
Technology	609.64	0.00	0.00	9.68	9.68	-12.44	0.75			0.01
Utilities	455.26	-1.71	-1.71	-6.99	-6.99	-7.98				



What Move the GCC markets

Oil Prices

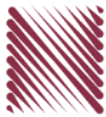
Oil prices climbed about 3% to a one-week high on Friday on worries that tensions in Israel and Gaza could spread into a wider conflict that could disrupt global crude supplies. Brent futures rose \$2.25, or 2.6%, to \$90.18 a barrel.

Kuwait Market

The market closed down by – 2.18 % at 6,362.44 value traded 52.5 million KD, Premier market value reached 46.5 million KD down by – 2.49 % at 6,904.75

KSA Market

The market closed up today by + 0.71 % at 10,482.85

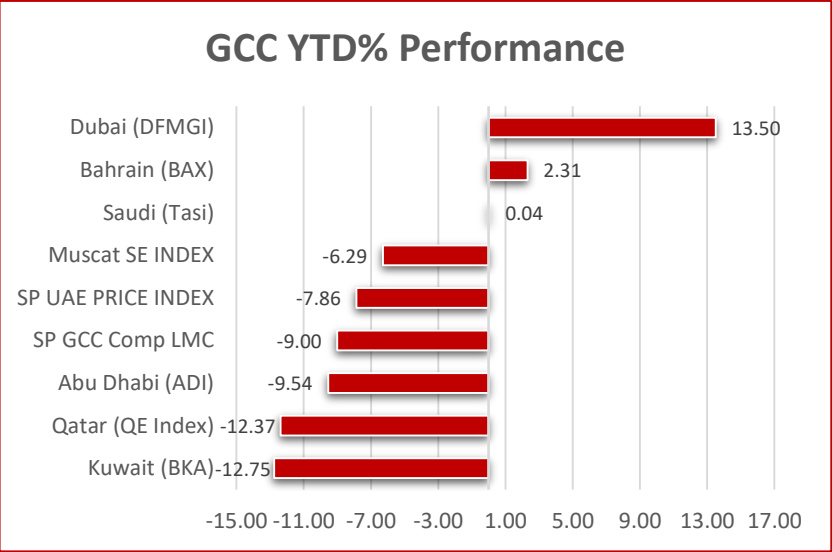


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.840	-3.00	-3.00	-7.28	-7.28	-18.18	1.59	12.24	4.02	6.66
KFH	0.661	-2.51	-2.51	-9.82	-9.82	-11.65	1.69	16.33	2.54	9.75
ZAIN	0.453	-1.74	-1.74	-6.98	-6.98	-19.54	1.58	9.33	7.73	1.96
BOUBYAN BANK	0.564	-4.08	-4.08	-6.62	-6.62	-25.08	2.26	34.81	1.00	2.23
AGILITY	0.504	-1.75	-1.75	-9.68	-9.68	-30.00	0.68	18.71	0.00	1.35
Saudi Arabia										
ARAMCO	32.95	-0.75	-0.75	-5.86	-5.86	12.91	5.22	15.70	4.10	7,973.90
SABIC	76.80	0.13	0.13	-6.91	-6.91	-14.09	1.30	58.12	4.95	230.40
STC	36.85	2.22	2.22	-1.99	-1.99	0.68	2.43	14.84	4.34	184.25
AL-RAJHI BANK	64.90	1.09	1.09	-4.42	-4.42	-13.70	2.52	15.22	2.73	259.60
NCB	32.50	2.20	2.20	-0.91	-0.91	-13.77	1.14	10.26	3.99	195.00
Abu Dhabi										
ETISALAT.AD	18.00	0.78	-4.26	-11.94	-11.94	-21.26	3.75	15.89	4.44	156.54
FAB.AD	12.44	-2.51	-4.31	-8.53	-8.53	-27.25	1.14	9.67	4.18	137.43
EMIRATES NBD	16.45	2.81	-1.20	-7.58	-7.58	26.54	0.99	4.97	3.65	103.91
DB ISLAMIC DB	5.22	-1.69	-0.95	-10.77	-10.77	-8.42	0.90	6.95	5.75	37.80
EMAR.DU	6.32	-2.02	-0.94	-21.39	-21.39	7.85	0.79	7.07	3.96	55.86
Qatar										
QNB	14.48	-2.16	-2.16	-5.97	-5.97	-19.56	1.24	9.49	4.14	133.52
INDUSTREIS QAT	12.45	-1.97	-1.97	-9.19	-9.19	-2.81	1.95	16.14	8.84	75.19
QA ISLAMIC BK	17.13	0.65	0.65	-7.70	-7.70	-7.70	1.42	10.06	3.65	40.41
MASRAF AL RAYA	2.06	8.76	8.76	-7.54	-7.54	-35.00	0.79	16.30	4.85	19.13
MESAIEED PETRO	1.59	5.73	5.73	-14.39	-14.39	-25.34	1.18	17.42	6.93	19.92
Oman										
BANK MUSCAT	0.254	0.00	0.00	-8.63	-8.63	-7.64	0.83	9.62	5.91	1.90
OMANTEL	1.010	-0.98	-0.98	2.02	2.02	9.78	1.21	32.66	3.22	0.76
BANK DHOFAR	0.160	0.00	0.00	-5.88	-5.88	-8.57	0.67	18.37	3.13	0.48
NAT BANK OF OMAN	0.304	0.66	0.66	-1.62	-1.62	5.19	0.76	11.12	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
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 -2.18 %The leading sector bottom performance indices today are Banking -2.75 % Financial services -1.97 % Consumer Disc -1.94 % respectively

KSA

Saudi Armco has a negative performance today by -0.75 %, SABIC has a positive performance today by + 0.13 %, STC has a positive performance today by + 2.22 %, Al Rajhi Bank has a positive performance today by + 1.09 %

U.A.E

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



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