

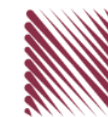


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, October 2nd 2023





Monday, October 2, 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)	11,005.94	-0.31	-0.45	-0.45	-0.45	5.03	3.02	18.96	3.15	11,233.57
Qatar (QE Index)	10,257.09	0.40	0.05	0.05	0.05	-3.97	1.24	10.55	4.75	545.12
Dubai (DFMGI)	4,183.14	0.47	0.47	0.47	0.47	25.39	1.54	10.33	4.22	599.96
Abu Dhabi (ADI)	9,787.56	0.02	0.02	0.02	0.02	-4.15	2.54	15.77	2.22	2,752.99
Bahrain (BAX)	1,933.45	-0.19	-0.29	-0.29	-0.29	2.01	0.76	9.35	6.01	7.06
Muscat SE INDEX	4,735.48	0.77	1.42	1.42	1.42	-2.51	0.85	10.24	4.66	6.60
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	2,838.78	-0.51	-0.51	-0.51	-0.51	9.07				
U.S. (S&P 500)	4,299.70	0.59	-0.47	-4.61	-3.39	11.99	3.82	21.90	2.12	37,994.75
U.K. (FTSE 100)	7,510.72	-1.28	-1.28	-1.28	-1.28	0.79	1.56	10.58	3.92	2,000.32
Japan (topix)	2,314.44	-0.39	-0.39	-0.39	-0.39	22.35	1.35	13.79	2.21	836,553.40
Emerging Markets										
MSCI EM Index	951.49	-0.14	-0.14	-0.14	-0.14	-0.51				
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	128,625.61

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,854.58	-0.91	-0.47	-0.47	-0.47	-6.00	1.46	15.48	3.27	44.94
Kuwait Premier Index	7,467.67	-1.12	-0.71	-0.71	-0.71	-7.98	1.61	17.04	3.12	35.84
Kuwait Main Index	5,741.05	-0.15	0.41	0.41	0.41	2.58	1.05	11.09	3.90	9.09
Kuwait Sector										
Banking	1,667.31	-1.10	-0.78	-0.78	-0.78	-7.06	1.71	17.65	2.73	28.61
Telecom	1,071.54	-1.37	-0.07	-0.07	-0.07	-9.30	1.64	10.11	6.50	3.33
Industrials	914.88	-1.01	-0.57	-0.57	-0.57	-15.20	1.03	15.98	3.03	3.25
Financial Services	1,236.52	-0.73	-0.15	-0.15	-0.15	-1.65	0.99	14.44	3.98	3.96
Real Estate	1,189.87	0.49	1.22	1.22	1.22	-1.56	0.92	14.57	2.12	2.54
Basic Materials	840.40	-0.42	0.88	0.88	0.88	-2.86	1.47	9.42	9.26	0.48
Health Care	475.11	0.00	0.00	0.00	0.00	2.87	1.72	12.21	1.75	0.24
Consumer Staples	587.77	-1.10	-1.38	-1.38	-1.38	22.46	1.36	74.48	2.07	0.18
Insurance	2,225.12	-0.12	0.18	0.18	0.18	43.48	1.24	7.42	4.19	0.90
Consumer Discretionary	1,551.49	-0.48	-0.36	-0.36	-0.36	4.35				
Energy	944.72	1.92	-1.72	-1.72	-1.72	-17.02	0.73	9.24	5.48	0.19
Technology	611.10	9.23	9.95	9.95	9.95	-12.23	0.69			0.01
Utilities	492.11	0.00	0.54	0.54	0.54	-0.53				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

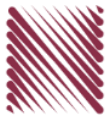
Oil prices rose Monday after suffering losses at the end of last week, as investors' focus returned to a tight global supply outlook while a last-minute deal that avoided a U.S. government shutdown restored some risk appetite. Brent December crude futures rose 81 cents, or 0.9%, to \$93.01 a barrel

Kuwait Market

The market closed down by - 0.91% at 6,854.58 value traded 43.5 million KD, Premier market value reached 31.5 million KD down by - 1.12% at 7,467.67

KSA Market

The market closed down today by – 0.31% at 11,005.94



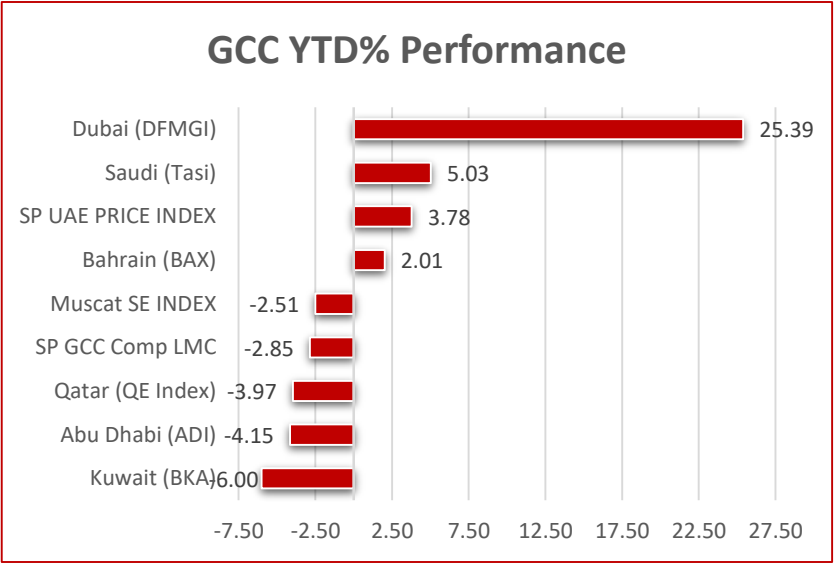
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.890	-1.66	-1.77	-1.77	-1.77	-13.31	1.71	13.45	3.80	7.06
KFH	0.726	-1.36	-0.95	-0.95	-0.95	-2.96	1.85	18.91	2.32	10.73
ZAIN	0.483	-1.83	-0.82	-0.82	-0.82	-14.21	1.69	9.95	7.25	2.09
BOUBYAN BANK	0.608	0.00	0.66	0.66	0.66	-19.24	2.49	40.24	0.93	2.41
AGILITY	0.549	-2.14	-1.61	-1.61	-1.61	-23.75	0.74	20.38	0.00	1.47
Saudi Arabia										
ARAMCO	34.30	-1.15	-2.00	-2.00	-2.00	17.54	5.43	16.34	3.94	8,301.04
SABIC	82.00	-0.85	-0.61	-0.61	-0.61	-8.28	1.39	62.06	4.63	246.01
STC	37.30	-0.67	-0.80	-0.80	-0.80	1.91	2.46	15.02	4.29	186.51
AL-RAJHI BANK	67.60	-0.15	-0.44	-0.44	-0.44	-10.11	2.62	15.86	2.63	270.41
NCB	33.90	2.42	3.35	3.35	3.35	-10.05	1.19	10.71	3.83	203.41
Abu Dhabi										
ETISALAT.AD	20.42	-0.10	-0.10	-0.10	-0.10	-10.67	4.25	18.03	3.92	177.59
FAB.AD	13.68	0.59	0.59	0.59	0.59	-20.00	1.30	11.59	3.80	151.13
EMIRATES NBD	17.70	-0.56	-0.56	-0.56	-0.56	36.15	1.14	5.75	3.39	111.80
DB ISLAMIC DB	5.85	0.00	0.00	0.00	0.00	2.63	1.01	7.79	5.13	42.36
EMAR.DU	8.38	4.23	4.23	4.23	4.23	43.00	1.04	9.38	2.98	74.07
Qatar										
QNB	15.500	1.64	0.65	0.65	0.65	-13.89	1.39	10.38	3.87	143.15
INDUSTREIS QAT	13.810	0.66	0.73	0.73	0.73	7.81	2.23	16.00	7.97	83.54
QA ISLAMIC BK	18.450	-0.43	-0.59	-0.59	-0.59	-0.59	1.58	11.02	3.39	43.59
MASRAF AL RAYA	2.197	-0.54	-1.44	-1.44	-1.44	-30.72	0.85	19.70	4.55	20.43
MESAIEED PETRO	1.860	1.14	0.27	0.27	0.27	-12.55	1.41	17.79	5.91	23.36
Oman										
BANK MUSCAT	0.282	1.08	1.44	1.44	1.44	2.55	0.95	11.10	5.32	2.12
OMANTEL	1.000	0.00	1.01	1.01	1.01	8.70	1.20	32.34	3.25	0.75
BANK DHOFAR	0.175	0.00	2.94	2.94	2.94	0.00	0.73	20.09	2.86	0.53
NAT BANK OF OMAN	0.315	1.61	1.94	1.94	1.94	9.00	0.79	11.52	2.35	0.51
OMINVEST	0.400	0.00	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 down today by - 0.91 % The leading sector bottom performance indices today are Telecom - 1.37 %, Banking - 1.10 % Industrial – 1.01 % respectively

KSA

Saudi Armco has a negative performance today by – 1.15%, SABIC has a negative performance today by - 0.85%, STC has a negative performance today by – 0.67 %, Al Rajhi Bank has a negative performance today by – 0.15%

U.A.E

ETISALAT .AD has a negative performance today by – 0.10 %, FAB.AD has a positive performance today by + 0.59%



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