



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, October 31st 2023

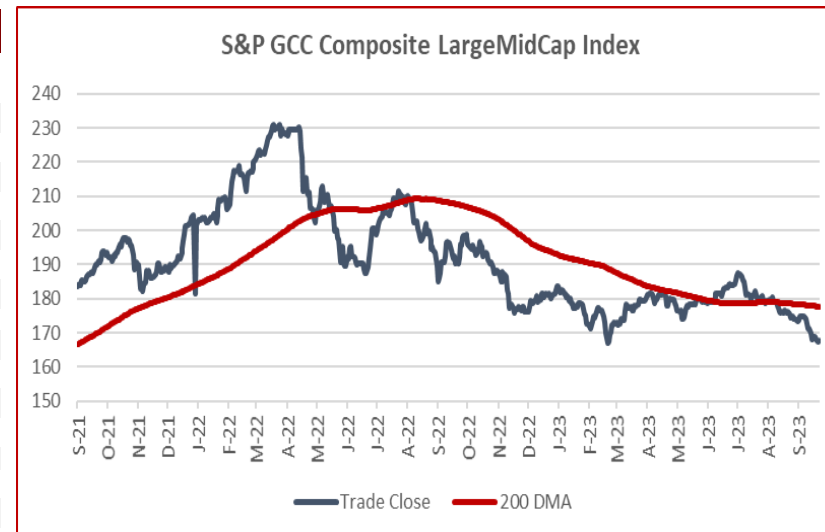




Tuesday, October 31, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,690.09	1.46	2.70	-3.31	-3.31	2.02	2.91	17.64	3.28	10,932.64
Qatar (QE Index)	9,523.53	0.05	2.19	-7.11	-7.11	-10.84	1.15	11.32	5.12	505.33
Dubai (DFMGI)	3,877.08	1.00	2.39	-6.88	-6.88	16.22	1.42	9.26	4.57	558.66
Abu Dhabi (ADI)	9,343.88	0.63	1.16	-4.51	-4.51	-8.49	2.41	15.51	2.36	2,584.82
Bahrain (BAX)	1,929.26	-0.10	-0.61	-0.51	-0.51	1.79	0.76	9.26	6.03	7.04
Muscat SE INDEX	4,545.46	0.05	-0.18	-2.65	-2.65	-6.42	0.81	9.32	4.90	6.29
SP GCC Comp LMC	166.67	1.50	2.71	-4.62	-4.62	-6.77	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.23	1.26	2.79	-8.76	-8.76	-5.29				
Developed Markets										
MSCI World Index	2,768.62	0.40	1.34	-2.97	-2.97	6.38				
U.S. (S&P 500)	4,193.80	0.65	1.86	-2.20	-2.20	9.23	3.76	20.96	2.18	36,833.06
U.K. (FTSE 100)	7,321.72	-0.08	0.42	-3.76	-3.76	-1.74	1.52	9.83	4.00	1,944.60
Japan (topix)	2,253.72	1.01	-0.04	-3.00	-3.00	19.14	1.32	13.25	2.33	815,257.40
Emerging Markets										
MSCI EM Index	915.20	-0.73	-0.50	-3.95	-3.95	-4.31				
China (SSE Composite)	3,018.77	-0.09	0.03	-2.95	-2.95	-2.28	1.36	12.00		44,025.04
India (Sensex)	63,874.93	-0.37	0.14	-2.97	-2.97	4.99	4.13	21.19	1.27	125,135.55

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,531.76	1.07	0.42	-5.15	-5.15	-10.43	1.37	14.07	3.49	42.26
Kuwait Premier Index	7,142.68	1.35	0.87	-5.03	-5.03	-11.99	1.52	15.63	3.32	33.73
Kuwait Main Index	5,395.95	0.05	-1.21	-5.62	-5.62	-3.59	0.98	9.81	4.15	8.53
Kuwait Sector										
Banking	1,577.37	1.15	0.28	-6.13	-6.13	-12.07	1.60	15.59	2.92	26.77
Telecom	1,053.27	1.80	2.32	-1.77	-1.77	-10.85	1.57	9.49	6.82	3.18
Industrials	887.26	0.72	1.93	-3.57	-3.57	-17.76	0.98	15.23	3.18	3.10
Financial Services	1,155.66	0.42	-1.22	-6.68	-6.68	-8.08	0.92	13.17	4.30	3.67
Real Estate	1,152.31	1.34	0.38	-1.98	-1.98	-4.67	0.88	13.97	2.20	2.44
Basic Materials	757.42	0.92	-0.23	-9.08	-9.08	-12.45	1.31	9.77	10.42	0.42
Health Care	467.62	-0.43	-0.43	-1.58	-1.58	1.25	1.70	12.07	1.77	0.23
Consumer Staples	585.00	1.43	-0.12	-1.84	-1.84	21.89	1.32	72.57	2.14	0.18
Insurance	2,237.93	-0.64	-0.19	0.75	0.75	44.31	1.26	7.50	4.14	0.91
Consumer Discretionary	1,503.18	2.15	0.94	-3.47	-3.47	1.10				
Energy	901.67	-0.40	-0.24	-6.20	-6.20	-20.80	0.71	9.04	5.61	0.19
Technology	603.82	4.14	-0.95	8.64	8.64	-13.27	0.72			0.01
Utilities	457.89	0.00	-1.14	-6.45	-6.45	-7.45				



What Move the GCC markets

Oil Prices

Oil prices rose in early Asian trade on Tuesday ahead of global central bank meetings and as tensions in the Middle East remained high. Brent crude futures rose 46 cents, or 0.53%, to \$87.91 a barrel

Kuwait Market

The market closed up by + 1.07 % at 6,531.76 value traded 48.4 million KD, Premier market value reached 43.7 million KD up by + 1.35 % at 7,142.68

KSA Market

The market closed up today by + 1.46 % at 10,690.09

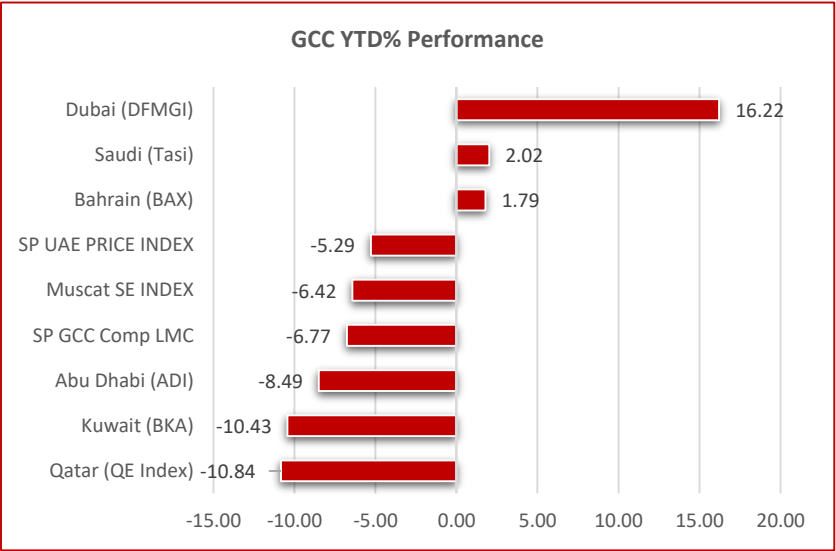


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.877	2.57	1.27	-3.20	-3.20	-14.58	1.66	12.78	3.86	6.96
KFH	0.684	0.59	0.88	-6.68	-6.68	-8.58	1.75	16.89	2.46	10.11
ZAIN	0.481	2.56	4.34	-1.23	-1.23	-14.56	1.68	9.91	7.28	2.08
BOUBYAN BANK	0.586	1.56	-0.34	-2.98	-2.98	-22.16	2.35	36.17	0.97	2.33
AGILITY	0.526	0.57	2.53	-5.73	-5.73	-26.94	0.71	19.52	0.00	1.41
Saudi Arabia										
ARAMCO	33.30	1.06	0.30	-4.86	-4.86	14.11	5.27	15.86	4.06	8,058.39
SABIC	77.00	1.18	0.39	-6.67	-6.67	-13.87	1.31	58.28	4.94	230.99
STC	38.40	3.50	6.52	2.13	2.13	4.92	2.54	15.46	4.17	191.99
AL-RAJHI BANK	67.10	3.07	4.52	-1.18	-1.18	-10.77	2.60	15.74	2.65	268.39
NCB	33.55	4.68	5.50	2.29	2.29	-10.98	1.17	10.60	3.87	201.29
Abu Dhabi										
ETISALAT.AD	18.46	0.65	2.56	-9.69	-9.69	-19.25	3.85	16.30	4.33	160.54
FAB.AD	12.68	1.28	1.93	-6.76	-6.76	-25.85	1.16	9.86	4.10	140.08
EMIRATES NBD	16.95	0.00	3.04	-4.78	-4.78	30.38	1.02	5.12	3.54	107.07
DB ISLAMIC DB	5.40	0.75	3.45	-7.69	-7.69	-5.26	0.94	7.19	5.56	39.10
EMAR.DU	6.69	2.92	5.85	-16.79	-16.79	14.16	0.83	7.49	3.74	59.13
Qatar										
QNB	14.890	1.43	0.61	-3.31	-3.31	-17.28	1.28	9.76	4.03	137.21
INDUSTREIS QAT	12.220	-2.24	-3.78	-10.87	-10.87	-4.61	1.91	15.84	9.00	73.76
QA ISLAMIC BK	17.400	0.81	2.23	-6.25	-6.25	-6.25	1.44	10.22	3.59	41.02
MASRAF AL RAYA	2.100	-0.24	10.82	-5.79	-5.79	-33.77	0.80	16.61	4.76	19.48
MESAIEED PETRO	1.590	-0.62	5.86	-14.29	-14.29	-25.25	1.18	17.45	6.92	19.93
Oman										
BANK MUSCAT	0.258	1.57	1.57	-7.19	-7.19	-6.18	0.84	9.78	5.81	1.94
OMANTEL	1.030	1.98	0.98	4.04	4.04	11.96	1.23	33.31	3.16	0.77
BANK DHOFAR	0.160	0.00	0.00	-5.88	-5.88	-8.57	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.304	0.00	0.66	-1.62	-1.62	5.19	0.74	10.97	2.43	0.49
OMINVEST	0.410	0.00	-1.91	4.06	4.06	-2.38	0.91	6.02	3.66	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 up today by + 1.07 % The leading sector top performance indices today are Technology + 4.14 % Consumer Discretionary + 2.15 % Telecom +1.80 % respectively

KSA
Saudi Armco has a positive performance today by + 1.06 %, SABIC has a positive performance today by + 1.18 %, STC has a positive performance today by + 3.50 %, Al Rajhi Bank has a positive performance today by + 3.07 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.65 %, FAB.AD has a positive performance today by + 1.28 %



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