

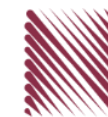


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, October 3rd 2023





Tuesday, October 3, 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)	10,952.34	-0.49	-0.94	-0.94	-0.94	4.52	3.01	18.91	3.16	11,164.35
Qatar (QE Index)	10,273.28	0.16	0.21	0.21	0.21	-3.82	1.24	10.57	4.75	545.13
Dubai (DFMGI)	4,201.84	0.45	0.92	0.92	0.92	25.95	1.54	10.34	4.21	603.68
Abu Dhabi (ADI)	9,839.09	0.53	0.55	0.55	0.55	-3.64	2.55	15.85	2.21	2,754.94
Bahrain (BAX)	1,935.13	0.09	-0.21	-0.21	-0.21	2.10	0.77	9.36	6.00	7.06
Muscat SE INDEX	4,739.61	0.09	1.51	1.51	1.51	-2.43	0.85	10.28	4.64	6.63
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	2,799.64	-1.38	-1.88	-1.88	-1.88	7.57				
U.S. (S&P 500)	4,229.45	-1.37	-1.37	-1.37	-1.37	10.16	3.81	21.91	2.13	38,022.26
U.K. (FTSE 100)	7,470.16	-0.54	-1.81	-1.81	-1.81	0.25	1.55	10.54	3.91	1,989.64
Japan (topix)	2,275.47	-1.68	-2.06	-2.06	-2.06	20.29	1.33	13.55	2.25	822,421.47
Emerging Markets										
MSCI EM Index	939.16	-1.30	-1.43	-1.43	-1.43	-1.80				
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)	65,512.10	-0.48	-0.48	-0.48	-0.48	7.68	4.23	22.51	1.23	128,108.16

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,858.86	0.06	-0.40	-0.40	-0.40	-5.94	1.45	15.35	3.30	44.56
Kuwait Premier Index	7,477.15	0.13	-0.58	-0.58	-0.58	-7.87	1.60	16.86	3.15	35.48
Kuwait Main Index	5,731.19	-0.17	0.24	0.24	0.24	2.40	1.05	11.08	3.90	9.08
Kuwait Sector										
Banking	1,667.64	0.02	-0.76	-0.76	-0.76	-7.04	1.69	17.48	2.75	28.33
Telecom	1,066.96	-0.43	-0.50	-0.50	-0.50	-9.69	1.62	9.97	6.59	3.29
Industrials	915.95	0.12	-0.45	-0.45	-0.45	-15.10	1.02	15.81	3.06	3.22
Financial Services	1,236.16	-0.03	-0.18	-0.18	-0.18	-1.68	0.98	14.35	4.01	3.93
Real Estate	1,207.65	1.49	2.73	2.73	2.73	-0.09	0.92	14.64	2.11	2.55
Basic Materials	848.82	1.00	1.89	1.89	1.89	-1.88	1.46	9.38	9.30	0.47
Health Care	475.11	0.00	0.00	0.00	0.00	2.87	1.72	12.21	1.75	0.24
Consumer Staples	589.49	0.29	-1.09	-1.09	-1.09	22.82	1.35	73.75	2.10	0.18
Insurance	2,214.50	-0.48	-0.30	-0.30	-0.30	42.80	1.24	7.41	4.19	0.90
Consumer Discretionary	1,546.07	-0.35	-0.71	-0.71	-0.71	3.98				
Energy	949.30	0.48	-1.24	-1.24	-1.24	-16.62	0.75	9.45	5.37	0.20
Technology	647.47	5.95	16.49	16.49	16.49	-7.00	0.75			0.01
Utilities	481.58	-2.14	-1.61	-1.61	-1.61	-2.66				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

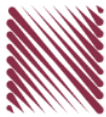
Oil prices lowered on Tuesday, after falling to a three-week low in the previous session, on a stronger U.S. dollar, a darkening global macroeconomic outlook and mixed supply signals. Brent futures lost 61 cents to \$90.10 a barrel

Kuwait Market

The market closed up by + 0.06% at 6,858.86 value traded 37.2 million KD, Premier market value reached 27.9 million KD up by + 0.13% at 7,477.15

KSA Market

The market closed down today by – 0.49% at 10,952.34



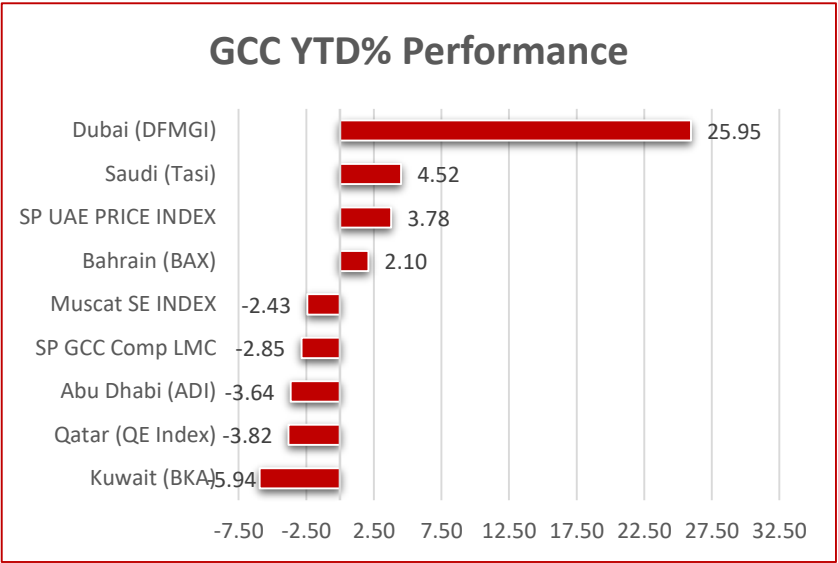
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.887	-0.34	-2.10	-2.10	-2.10	-13.60	1.71	13.40	3.81	7.03
KFH	0.728	0.28	-0.68	-0.68	-0.68	-2.70	1.86	18.96	2.31	10.74
ZAIN	0.480	-0.62	-1.44	-1.44	-1.44	-14.74	1.68	9.89	7.29	2.08
BOUBYAN BANK	0.611	0.49	1.16	1.16	1.16	-18.84	2.51	40.44	0.93	2.42
AGILITY	0.551	0.36	-1.25	-1.25	-1.25	-23.47	0.74	20.45	0.00	1.47
Saudi Arabia										
ARAMCO	34.05	-0.73	-2.71	-2.71	-2.71	16.68	5.39	16.22	3.97	8,240.10
SABIC	82.10	0.12	-0.48	-0.48	-0.48	-8.17	1.39	62.13	4.63	246.30
STC	37.65	0.94	0.13	0.13	0.13	2.87	2.49	15.16	4.25	188.25
AL-RAJHI BANK	67.00	-0.89	-1.33	-1.33	-1.33	-10.90	2.60	15.71	2.65	268.00
NCB	33.60	-0.88	2.44	2.44	2.44	-10.85	1.17	10.61	3.86	201.60
Abu Dhabi										
ETISALAT.AD	20.50	0.39	0.29	0.29	0.29	-10.32	4.27	18.10	3.90	178.30
FAB.AD	13.74	0.44	1.03	1.03	1.03	-19.65	1.30	11.64	3.78	151.81
EMIRATES NBD	18.05	1.98	1.40	1.40	1.40	38.85	1.16	5.86	3.32	114.02
DB ISLAMIC DB	5.78	-1.20	-1.20	-1.20	-1.20	1.40	1.00	7.69	5.19	41.85
EMAR.DU	8.21	-2.03	2.11	2.11	2.11	40.10	1.02	9.19	3.05	72.57
Qatar										
QNB	15.440	-0.39	0.26	0.26	0.26	-14.22	1.38	10.34	3.89	142.59
INDUSTREIS QAT	13.790	-0.14	0.58	0.58	0.58	7.65	2.23	15.98	7.98	83.42
QA ISLAMIC BK	18.620	0.92	0.32	0.32	0.32	0.32	1.60	11.12	3.36	43.99
MASRAF AL RAYA	2.193	-0.18	-1.62	-1.62	-1.62	-30.84	0.85	19.66	4.56	20.39
MESAIEED PETRO	1.850	-0.54	-0.27	-0.27	-0.27	-13.02	1.40	17.69	5.95	23.24
Oman										
BANK MUSCAT	0.284	0.71	2.16	2.16	2.16	3.27	0.95	11.18	5.28	2.13
OMANTEL	1.015	1.50	2.53	2.53	2.53	10.33	1.21	32.83	3.20	0.76
BANK DHOFAR	0.175	0.00	2.94	2.94	2.94	0.00	0.73	20.09	2.86	0.52
NAT BANK OF OMAN	0.315	0.00	1.94	1.94	1.94	9.00	0.79	11.52	2.35	0.51
OMINVEST	0.399	-0.25	1.27	1.27	1.27	-5.00	0.89	5.86	3.76	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 up today by + 0.06 % The leading sector top performance indices today are Technology + 5.95 %, Real Estate + 1.49 % Basic Material + 1.0 % respectively

KSA

Saudi Armco has a negative performance today by – 0.73%, SABIC has a positive performance today by + 0.12%, STC has a positive performance today by + 0.94 %, Al Rajhi Bank has a negative performance today by – 0.89 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.39 %, FAB.AD has a positive performance today by + 0.44%



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