



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, October 4th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,840.27	-1.02	-1.95	-1.95	-1.95	3.45	2.97	18.66	3.21	11,067.62
Qatar (QE Index)	10,187.38	-0.84	-0.63	-0.63	-0.63	-4.62	1.23	10.48	4.79	540.63
Dubai (DFMGI)	4,192.29	-0.23	0.69	0.69	0.69	25.67	1.53	10.29	4.22	601.43
Abu Dhabi (ADI)	9,823.84	-0.15	0.39	0.39	0.39	-3.79	2.54	15.82	2.22	2,747.83
Bahrain (BAX)	1,946.31	0.58	0.37	0.37	0.37	2.69	0.77	9.41	5.97	7.11
Muscat SE INDEX	4,733.33	-0.13	1.38	1.38	1.38	-2.55	0.85	10.28	4.64	6.62
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	2,810.86	0.40	-1.49	-1.49	-1.49	8.00				
U.S. (S&P 500)	4,263.75	0.81	-0.57	-0.57	-0.57	11.05	3.76	21.61	2.15	37,494.17
U.K. (FTSE 100)	7,412.45	-0.77	-2.57	-2.57	-2.57	-0.53	1.54	10.41	3.94	1,973.97
Japan (topix)	2,218.89	-2.49	-4.50	-4.50	-4.50	17.30	1.29	13.21	2.31	802,189.04
Emerging Markets										
MSCI EM Index	927.86	-1.20	-2.62	-2.62	-2.62	-2.98				
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)	65,226.04	-0.44	-0.92	-0.92	-0.92	7.21	4.21	22.41	1.23	127,544.49
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,831.16	-0.40	-0.81	-0.81	-0.81	-6.32	1.45	15.35	3.30	44.57
Kuwait Premier Index	7,459.41	-0.24	-0.82	-0.82	-0.82	-8.09	1.60	16.88	3.15	35.52
Kuwait Main Index	5,673.25	-1.01	-0.77	-0.77	-0.77	1.37	1.04	11.05	3.91	9.06
Kuwait Sector										
Banking	1,657.82	-0.59	-1.34	-1.34	-1.34	-7.59	1.69	17.48	2.75	28.34
Telecom	1,065.05	-0.18	-0.68	-0.68	-0.68	-9.85	1.61	9.93	6.62	3.27
Industrials	911.87	-0.45	-0.89	-0.89	-0.89	-15.48	1.02	15.83	3.06	3.22
Financial Services	1,236.26	0.01	-0.17	-0.17	-0.17	-1.67	0.98	14.33	4.01	3.93
Real Estate	1,203.01	-0.38	2.33	2.33	2.33	-0.47	0.94	14.87	2.08	2.59
Basic Materials	844.94	-0.46	1.42	1.42	1.42	-2.33	1.48	9.47	9.21	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	590.83	0.23	-0.87	-0.87	-0.87	23.10	1.35	73.89	2.09	0.18
Insurance	2,231.38	0.76	0.46	0.46	0.46	43.88	1.24	7.37	4.22	0.89
Consumer Discretionary	1,552.43	0.41	-0.30	-0.30	-0.30	4.41				
Energy	954.59	0.56	-0.69	-0.69	-0.69	-16.16	0.75	9.48	5.35	0.20
Technology	654.75	1.12	17.80	17.80	17.80	-5.96	0.80			0.01
Utilities	481.58	0.00	-1.61	-1.61	-1.61	-2.66				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil fell on Wednesday, as pledges by Saudi Arabia and Russia to continue crude output cuts to the end of 2023 were offset by demand fears stemming from macroeconomic headwinds. Brent crude oil futures were down \$1.58, or 1.74%, to \$89.34 a barrel

Kuwait Market

The market closed down by - 0.40% at 6,831.16 value traded 29.4 million KD, Premier market value reached 20.2 million KD down by - 0.24% at 7,459.41

KSA Market

The market closed down today by – 1.02% at 10,840.27



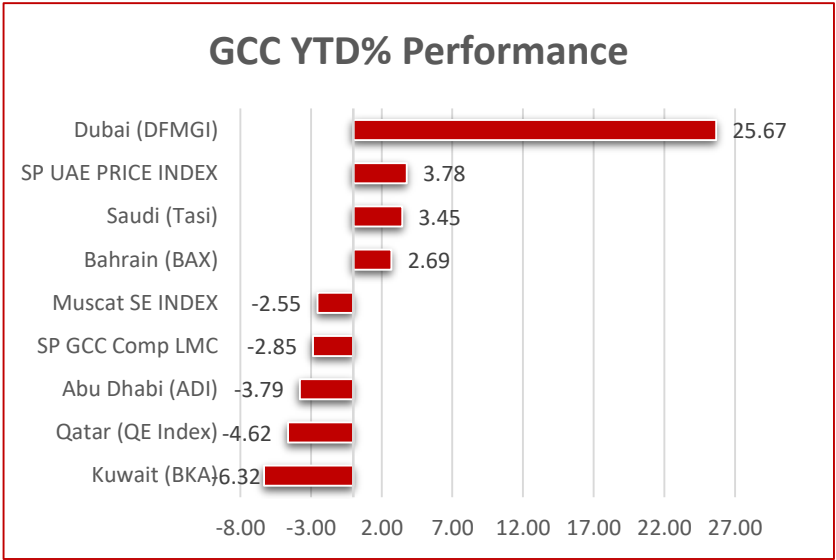
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.884	-0.34	-2.43	-2.43	-2.43	-13.90	1.70	13.36	3.82	7.01
KFH	0.729	0.14	-0.55	-0.55	-0.55	-2.56	1.86	18.98	2.31	10.77
ZAIN	0.476	-0.83	-2.26	-2.26	-2.26	-15.45	1.66	9.80	7.35	2.06
BOUBYAN BANK	0.612	0.16	1.32	1.32	1.32	-18.71	2.51	40.50	0.92	2.43
AGILITY	0.543	-1.45	-2.69	-2.69	-2.69	-24.58	0.73	20.16	0.00	1.45
Saudi Arabia										
ARAMCO	33.80	-0.73	-3.43	-3.43	-3.43	15.83	5.35	16.10	4.00	8,179.60
SABIC	81.10	-1.22	-1.70	-1.70	-1.70	-9.28	1.38	61.38	4.69	243.30
STC	37.00	-1.73	-1.60	-1.60	-1.60	1.09	2.44	14.90	4.32	185.00
AL-RAJHI BANK	66.60	-0.60	-1.91	-1.91	-1.91	-11.44	2.58	15.62	2.67	266.40
NCB	33.45	-0.45	1.98	1.98	1.98	-11.25	1.17	10.56	3.88	200.70
Abu Dhabi										
ETISALAT.AD	20.46	-0.20	0.10	0.10	0.10	-10.50	4.26	18.06	3.91	177.92
FAB.AD	13.80	0.44	1.47	1.47	1.47	-19.30	1.31	11.69	3.77	152.44
EMIRATES NBD	18.15	0.55	1.97	1.97	1.97	39.62	1.17	5.89	3.31	114.64
DB ISLAMIC DB	5.78	0.00	-1.20	-1.20	-1.20	1.40	1.00	7.69	5.19	41.85
EMAR.DU	7.94	-3.29	-1.24	-1.24	-1.24	35.49	0.99	8.89	3.15	70.17
Qatar										
QNB	15.380	-0.39	-0.13	-0.13	-0.13	-14.56	1.38	10.30	3.90	142.10
INDUSTREIS QAT	13.430	-2.61	-2.04	-2.04	-2.04	4.84	2.17	15.56	8.19	81.28
QA ISLAMIC BK	18.600	-0.11	0.22	0.22	0.22	0.22	1.60	11.11	3.36	43.96
MASRAF AL RAYA	2.189	-0.18	-1.79	-1.79	-1.79	-30.97	0.85	19.63	4.57	20.36
MESAIEED PETRO	1.830	-1.08	-1.35	-1.35	-1.35	-13.96	1.38	17.50	6.01	23.00
Oman										
BANK MUSCAT	0.285	0.35	2.52	2.52	2.52	3.64	0.96	11.22	5.26	2.14
OMANTEL	1.015	0.00	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	0.313	-0.63	1.29	1.29	1.29	8.30	0.78	11.45	2.36	0.51
OMINVEST	0.399	0.00	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 down today by - 0.40 % The leading sector bottom performance indices today are Banking - 0.59 %, Basic Materials - 0.46 % Industrials - 0.45 % respectively

KSA

Saudi Armco has a negative performance today by – 0.73%, SABIC has a negative performance today by - 1.22%, STC has a negative performance today by - 1.73 %, Al Rajhi Bank has a negative performance today by – 0.60 %

U.A.E

ETISALAT .AD has a negative performance today by - 0.20 %, FAB.AD has a positive performance today by + 0.44%



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