

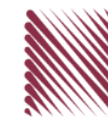


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, October 5th 2023





Thursday, October 5, 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)	10,764.85	-0.70	-2.63	-2.63	-2.63	2.73	2.95	18.54	3.22	10,968.80
Qatar (QE Index)	10,062.41	-1.23	-1.85	-1.85	-1.85	-5.79	1.21	10.35	4.84	534.75
Dubai (DFMGI)	4,164.61	0.52	0.02	0.02	0.02	24.84	1.52	10.24	4.24	598.35
Abu Dhabi (ADI)	9,756.43	-0.06	-0.30	-0.30	-0.30	-4.45	2.53	15.72	2.23	2,727.29
Bahrain (BAX)	1,950.87	0.23	0.61	0.61	0.61	2.93	0.77	9.44	5.96	7.12
Muscat SE INDEX	4,734.99	0.04	1.41	1.41	1.41	-2.52	0.85	10.29	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	2,845.23	1.02	-0.28	-0.28	-0.28	9.32				
U.S. (S&P 500)	4,308.50	1.18	0.48	0.48	0.48	12.22	3.83	22.02	2.13	38,202.95
U.K. (FTSE 100)	7,494.58	0.58	-1.49	-1.49	-1.49	0.57	1.56	10.52	3.90	1,994.87
Japan (topix)	2,264.08	0.01	-2.55	-2.55	-2.55	19.68	1.32	13.48	2.26	818,584.02
Emerging Markets										
MSCI EM Index	937.34	0.76	-1.62	-1.62	-1.62	-1.99				
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)	65,995.63	0.55	0.25	0.25	0.25	8.47	4.26	22.68	1.22	129,133.55

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,789.68	-0.61	-1.41	-1.41	-1.41	-6.89	1.43	15.24	3.33	44.15
Kuwait Premier Index	7,401.70	-0.77	-1.58	-1.58	-1.58	-8.80	1.49	16.47	2.83	35.20
Kuwait Main Index	5,673.47	0.00	-0.77	-0.77	-0.77	1.37	1.03	10.91	3.95	8.97
Kuwait Sector										
Banking	1,642.77	-0.91	-2.24	-2.24	-2.24	-8.43	1.67	17.26	2.79	27.96
Telecom	1,065.54	0.05	-0.63	-0.63	-0.63	-9.81	1.61	9.92	6.63	3.27
Industrials	905.54	-0.69	-1.58	-1.58	-1.58	-16.07	1.01	15.65	3.09	3.18
Financial Services	1,235.66	-0.05	-0.22	-0.22	-0.22	-1.72	0.98	14.26	4.02	3.93
Real Estate	1,210.63	0.63	2.98	2.98	2.98	0.16	0.94	14.90	2.07	2.60
Basic Materials	829.37	-1.84	-0.45	-0.45	-0.45	-4.13	1.44	10.80	9.43	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	586.72	-0.70	-1.56	-1.56	-1.56	22.25	1.34	73.89	2.10	0.18
Insurance	2,232.39	0.05	0.51	0.51	0.51	43.95	1.25	7.43	4.18	0.90
Consumer Discretionary	1,538.05	-0.93	-1.23	-1.23	-1.23	3.44				
Energy	964.38	1.03	0.32	0.32	0.32	-15.30	0.76	9.64	5.26	0.20
Technology	651.11	-0.56	17.15	17.15	17.15	-6.48	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

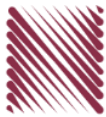
Oil prices rose on Friday but remained posted their steepest weekly losses since March, after another partial lifting of Russia's fuel export ban compounded demand fears due to macroeconomic headwinds. On Friday, Brent futures settled up 51 cents at \$84.58 per barrel.

Kuwait Market

The market closed down by - 0.61% at 6,789.68 value traded 35.6 million KD, Premier market value reached 22.9 million KD down by - 0.77% at 7,401.70

KSA Market

The market closed down today by – 0.70% at 10,764.85

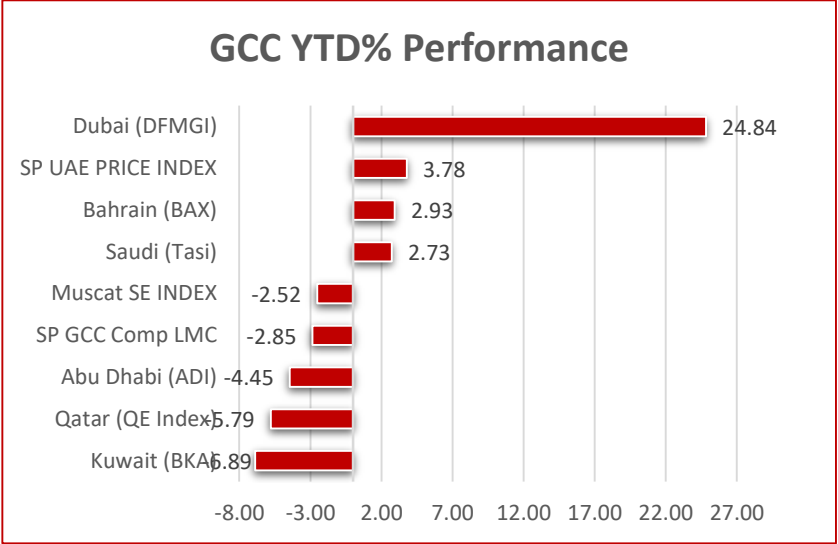


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.875	-1.02	-3.42	-3.42	-3.42	-14.77	1.68	13.22	3.86	6.94
KFH	0.722	-0.96	-1.50	-1.50	-1.50	-3.50	1.84	18.80	2.33	10.66
ZAIN	0.473	-0.63	-2.87	-2.87	-2.87	-15.99	1.65	9.74	7.40	2.05
BOUBYAN BANK	0.606	-0.98	0.33	0.33	0.33	-19.50	2.49	40.11	0.93	2.40
AGILITY	0.539	-0.74	-3.41	-3.41	-3.41	-25.14	0.73	20.01	0.00	1.44
Saudi Arabia										
ARAMCO	33.45	-1.04	-4.43	-4.43	-4.43	14.63	5.29	15.94	4.04	8,094.90
SABIC	82.90	2.22	0.48	0.48	0.48	-7.27	1.41	62.74	4.58	248.70
STC	37.00	0.00	-1.60	-1.60	-1.60	1.09	2.44	14.90	4.32	185.00
AL-RAJHI BANK	66.50	-0.15	-2.06	-2.06	-2.06	-11.57	2.58	15.60	2.67	266.00
NCB	33.10	-1.05	0.91	0.91	0.91	-12.18	1.16	10.45	3.92	198.60
Abu Dhabi										
ETISALAT.AD	20.18	-1.78	-3.03	-3.03	-3.03	-13.30	4.13	17.50	4.04	172.37
FAB.AD	13.76	0.00	1.18	1.18	1.18	-19.53	1.31	11.66	3.78	152.02
EMIRATES NBD	17.75	1.69	1.40	1.40	1.40	38.85	1.16	5.86	3.32	114.01
DB ISLAMIC DB	5.74	0.87	-1.03	-1.03	-1.03	1.58	1.00	7.71	5.18	41.92
EMAR.DU	7.80	-0.13	-3.11	-3.11	-3.11	32.94	0.97	8.72	3.21	68.85
Qatar										
QNB	15.350	-0.20	-0.32	-0.32	-0.32	-14.72	1.38	10.28	3.91	141.78
INDUSTREIS QAT	13.350	-0.60	-2.63	-2.63	-2.63	4.22	2.16	15.47	8.24	80.77
QA ISLAMIC BK	18.200	-2.15	-1.94	-1.94	-1.94	-1.94	1.56	10.87	3.43	43.01
MASRAF AL RAYA	2.180	-0.41	-2.20	-2.20	-2.20	-31.25	0.85	19.55	4.59	20.27
MESAIEED PETRO	1.772	-3.17	-4.47	-4.47	-4.47	-16.69	1.34	16.94	6.21	22.26
Oman										
BANK MUSCAT	0.286	0.35	2.88	2.88	2.88	4.00	0.96	11.26	5.24	2.15
OMANTEL	1.000	-1.48	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	0.52
NAT BANK OF OMAN	0.314	0.32	1.62	1.62	1.62	8.65	0.78	11.49	2.36	0.51
OMINVEST	0.400	0.25	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
27-September-23	24.33%	14.78%	0.07%	2.01%	0.23%	5.20%	17.54%	13.40%	6.06%	4.95%
04-October-23	24.32%	14.88%	0.07%	2.13%	0.23%	5.25%	17.54%	13.39%	6.05%	4.99%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is down today by -0.61 %The leading sector bottom performance indices today are Basic materials -1.84 % Consumer Disc -0.93 % Banking -0.91 % respectively

KSA
Saudi Armco have negative performance today by -1.04 %, SABIC have positive performance today by + 2.21 %. STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.15 %

U.A.E
ETISALAT .AD have negative performance today by -1.78 %, FAB.AD flat performance today 0 %,



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