



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

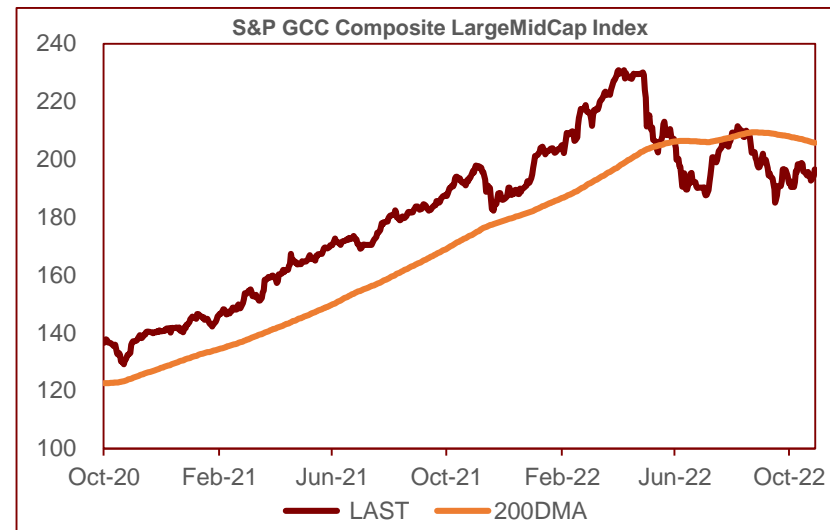
Thursday, November 10<sup>th</sup> 2022





Market Watch Thursday, November 10, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,211.70	-1.71	-1.99	-3.91	-1.70	-0.62	10,426 SAR	1.78	16.87
Qatar (QE Index)	12,557.26	-0.84	2.04	1.15	-1.09	8.01	640 QAR	1.45	14.49
Dubai (DFMGI)	3,407.31	-0.03	1.61	1.57	1.35	5.89	457 AED	1.23	13.06
Abu Dhabi (ADI)	10,629.75	0.01	2.29	1.99	8.91	25.11	1,435 AED	2.06	22.49
Bahrain (BAX)	1,865.84	0.05	0.20	0.06	-0.86	3.82	19 BHD	0.00	15.29
MUSCAT SE INDEX	4,428.43	0.01	0.61	1.43	-2.21	7.24	5 OMR	0.00	13.25
SP GCC Comp LMC	192.98	-1.31	-0.04	-1.61	0.97	1.47			
SP UAE PRICE INDEX	147.05	-0.26	2.79	1.49	4.85	-1.37			
<b>Developed Markets</b>									
MSCI World Index	2,674.08	5.05	6.83	3.49	10.84	-18.42			
U.S. (S&P 500)	3,992.93	5.54	6.36	2.18	10.34	-16.99			
U.K. (FTSE 100)	7,318.04	1.08	2.60	3.96	6.98	-0.12			
Japan (Topix)	1,977.76	-0.66	-0.20	0.37	5.49	-2.79			
<b>Emerging Markets</b>									
MSCI EM Index	935.73	-1.19	3.33	4.89	1.58	-27.79			
China (SSE Composite)	3,087.29	-0.39	1.28	4.93	0.39	-16.58			
India (Sensex)	61,795.04	-0.69	-0.37	-0.22	5.55	4.05			
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,541.81	-0.39	2.40	3.05	6.14	7.08	48.14 KWD	2.34	28.44
Kuwait Premier Index	8,460.44	-0.50	2.66	3.29	6.42	10.75	38.15 KWD	2.53	24.31
Kuwait Main Index	5,603.81	0.06	1.33	2.08	4.97	-4.80	9.98 KWD	1.60	44.29
NIC 50	9,099.17	0.00	2.65	3.28	6.41	6.77	28.60 KWD	2.51	23.31
<b>Kuwait Sector</b>									
Banking	1,850.57	-0.47	2.44	3.27	6.15	14.04	30.92 KWD	1.38	25.31
Telecom	1,222.42	-0.25	0.83	0.86	5.07	12.21	3.73 KWD	0.97	12.95
Industrials	1,136.85	-0.66	2.56	2.85	11.83	-0.41	3.99 KWD	0.84	17.05
Financial services	1,330.50	0.12	3.69	4.29	6.12	-6.52	3.41 KWD	0.67	22.48
Real estate	1,264.50	-0.38	2.55	2.86	5.19	-4.67	2.71 KWD	0.60	22.51
Basic materials	879.17	0.08	3.17	2.66	-2.47	-14.21	0.78 KWD	1.31	9.60
Health care	481.52	0.00	1.86	-0.09	4.74	-39.59	0.24 KWD	2.75	10.78
Consumer services	458.15	-0.82	1.76	0.69	-1.97	-37.34	0.75 KWD	1.00	11.10
Insurance	1,498.67	-0.13	-1.51	-1.76	-0.17	-2.26	0.62 KWD	0.89	8.02
Consumer Disc	1,475.02	0.05	3.05	5.61	6.49	10.35	0.14 KWD	0.92	0.00
Energy	1,075.09	-0.96	3.68	5.33	0.71	-24.72	0.22 KWD	0.78	11.09
Technology	653.29	0.45	8.19	7.16	10.86	-4.47	0.01 KWD	0.80	0.00
Utilities	513.16	-0.51	1.04	1.04	0.00	-14.47	0.21 KWD	1.81	16.04



### What Move the GCC markets

#### Oil Prices

Oil extended losses on Thursday for a fourth consecutive session as renewed Covid curbs in China raised concern about fuel demand in the world's biggest crude importer. Brent crude was down 49 cents, or 0.5%, to \$92.14 a barrel.

#### Kuwait Market

The market closed down today by - 0.39% at 7,541.81 value traded 66.6 million KD, Premier market value traded reached 46.1 million KD and closed at 8,460.44 down by - 0.50%.

#### KSA Market

The market closed down today by - 1.71% at 11,211.70.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



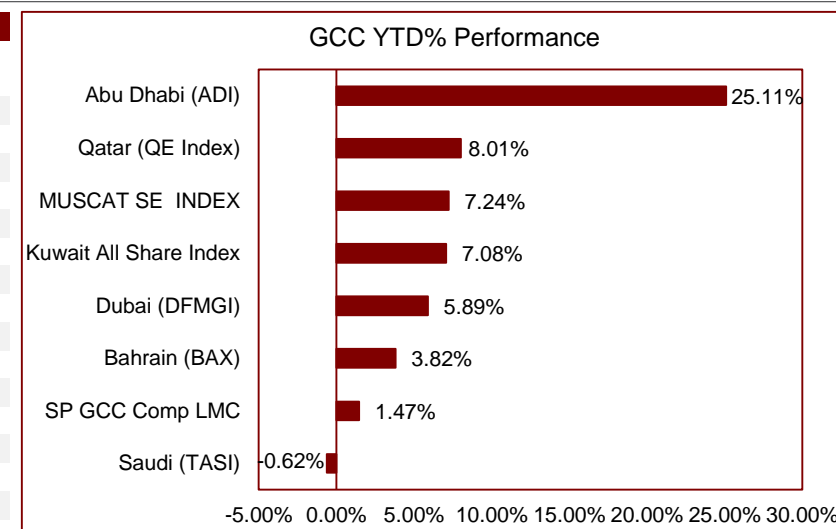
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.120	-1.06	0.90	3.90	14.75	17.95	8.41 KWD	2.15	27.00
KFH	0.848	-0.35	4.95	4.69	0.83	12.12	11.22 KWD	3.50	32.00
Zain	0.606	-0.49	1.00	1.17	3.59	1.85	2.61 KWD	2.18	12.97
BOUBYAN BANK	0.838	0.00	2.07	1.70	9.54	17.64	3.12 KWD	3.32	34.00
Agility	0.803	-1.47	3.21	2.42	20.21	1.97	2.14 KWD	1.37	2.54
<b>Saudi Arabia</b>									
ARAMCO	34.20	-0.29	-0.29	-2.01	-4.60	5.08	7,522.00 SAR	5.42	13.11
SABIC	83.90	-0.47	-1.99	-5.09	-5.52	-27.67	251.63 SAR	1.38	35.00
STC	38.30	-1.29	-2.42	-5.20	-2.67	-14.81	191.45 SAR	2.61	16.11
AL-RAJHI BANK	84.10	-1.41	-0.24	-1.29	3.44	-5.11	336.31 SAR	3.91	22.43
NCB	54.90	-4.02	-5.34	-7.58	-13.00	-14.75	245.78 SAR	1.50	13.79
<b>United Arab Emirates</b>									
ETISALAT.AD	25.20	-1.95	3.28	-2.33	7.88	-20.50	223.50 AED	4.70	20.81
FAB.AD	18.38	0.00	4.43	2.68	2.91	-1.30	204.15 AED	1.81	14.60
EMIRATES NBD	13.15	-0.38	1.15	-0.75	2.33	-2.95	83.69 AED	0.95	7.85
DB ISLAMIC BK	5.83	-0.17	0.87	0.17	-2.51	8.36	42.94 AED	1.06	8.51
EMAAR PROPERT	6.27	0.16	3.13	3.47	8.29	28.22	52.10 AED	0.82	6.94
<b>Qatar</b>									
QNB	20.12	-1.81	1.46	0.90	1.11	-0.35	187.05 QAR	1.77	14.41
INDUSTRIES QAT	15.80	-0.44	0.96	0.19	-6.51	2.00	96.22 QAR	2.36	10.07
QA ISLAMIC BK	24.99	-0.40	4.00	2.46	1.17	36.33	59.44 QAR	2.24	16.03
MASRAF AL RAYA	3.79	-0.84	0.69	-1.12	-7.91	-18.23	35.51 QAR	1.46	23.74
MESAIEED PETRO	2.25	-1.23	2.74	-0.79	-4.17	7.75	28.48 QAR	1.65	14.93
<b>OMAN</b>									
BANK MUSCAT	0.285	-2.40	-3.72	-0.35	-0.70	23.66	2.14 OMR	0.98	8.33
OMANTEL	0.844	-4.95	-0.47	0.48	-4.09	12.23	0.63 OMR	1.09	7.69
BANK DHOFAR	0.146	0.69	0.69	0.69	2.82	15.87	0.44 QAR	0.62	14.93
NAT BANK OF OMAN	0.256	0.00	0.39	-1.54	-5.19	29.95	0.42 QAR	0.72	12.71
OMINVEST	0.346	1.17	1.76	4.85	4.22	13.07	0.23 QAR	0.76	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Nov 22	24.22%	17.06%	0.06%	1.19%	0.37%	4.52%	17.78%	11.67%	5.83%	5.14%
9-Nov 22	24.46%	17.11%	0.06%	1.21%	0.37%	4.53%	17.78%	11.72%	5.86%	5.12%

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.39 % The leading sector bottom performance indices today are Energy -0.96 % Consumer services -0.82 % Industrials -0.66 % respectively

#### KSA

Saudi Armco has a negative performance today by -0.29 %, SABIC has a negative performance today by -0.47 %, STC has a negative performance today by -1.29 %, Al Rajhi Bank has a negative performance today by -1.41 %

#### U.A.E

ETISALAT .AD has a negative performance today by -1.95 %, FAB.AD has a flat performance today.



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