



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, November 13<sup>th</sup> 2022

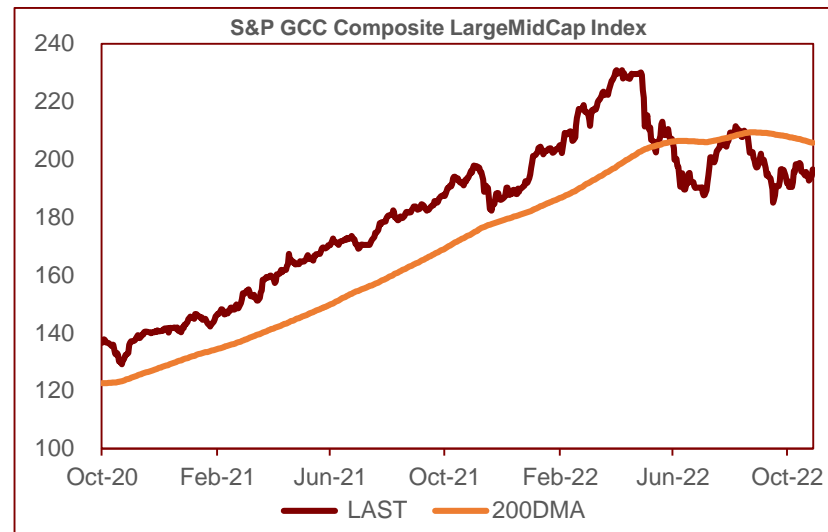




Market Watch Sunday, November 13, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,246.93	0.31	-1.68	-3.61	-1.39	-0.31	10,480 SAR	1.80	16.61
Qatar (QE Index)	12,609.97	0.42	2.47	1.58	-0.67	8.47	640 QAR	1.46	14.44
Dubai (DFMGI)	3,407.31	0.68	2.31	2.27	2.04	6.61	457 AED	1.23	13.05
Abu Dhabi (ADI)	10,629.75	0.10	2.39	2.09	9.01	25.23	1,435 AED	2.06	22.97
Bahrain (BAX)	1,867.93	0.11	0.31	0.18	-0.75	3.93	19 BHD	0.00	15.30
MUSCAT SE INDEX	4,471.87	0.98	1.60	2.43	-1.25	8.29	5 OMR	0.00	13.25
SP GCC Comp LMC	193.57	0.53	0.49	-1.09	1.51	2.01			
SP UAE PRICE INDEX	147.05	1.10	3.92	2.61	6.00	-0.28			
<b>Developed Markets</b>									
MSCI World Index	2,674.08	1.42	8.35	4.96	12.42	-17.26			
U.S. (S&P 500)	3,992.93	0.92	7.34	3.12	11.36	-16.22			
U.K. (FTSE 100)	7,318.04	-0.78	1.80	3.15	6.15	-0.90			
Japan (Topix)	1,977.76	2.12	1.92	2.50	7.72	-0.73			
<b>Emerging Markets</b>									
MSCI EM Index	935.73	5.18	8.69	10.32	6.84	-24.05			
China (SSE Composite)	3,087.29	1.69	2.99	6.70	2.08	-15.18			
India (Sensex)	61,795.04	1.95	1.58	1.73	7.61	6.08			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,623.04	1.08	3.50	4.16	7.28	8.23	49.02 KWD	2.37	28.63
Kuwait Premier Index	8,557.71	1.15	3.84	4.48	7.65	12.02	38.88 KWD	2.57	24.66
Kuwait Main Index	5,647.28	0.78	2.11	2.87	5.79	-4.06	10.14 KWD	1.61	43.92
NIC 50	9,099.17	0.00	3.83	4.47	7.64	6.77	28.60 KWD	2.55	23.66
<b>Kuwait Sector</b>									
Banking	1,873.13	1.22	3.69	4.53	7.45	15.43	31.53 KWD	1.39	25.66
Telecom	1,231.04	0.71	1.54	1.57	5.81	13.00	3.79 KWD	1.01	12.90
Industrials	1,145.70	0.78	3.36	3.65	12.70	0.37	4.05 KWD	0.85	17.08
Financial services	1,351.20	1.56	5.31	5.92	7.77	-5.07	3.49 KWD	0.70	23.90
Real estate	1,279.01	1.15	3.72	4.04	6.39	-3.57	2.76 KWD	0.62	22.80
Basic materials	881.57	0.27	3.45	2.94	-2.20	-13.97	0.79 KWD	1.25	9.63
Health care	454.28	-5.66	-3.90	-5.75	-1.19	-43.00	0.23 KWD	2.75	8.84
Consumer services	447.83	-2.25	-0.53	-1.58	-4.17	-38.75	0.77 KWD	1.00	11.35
Insurance	1,489.86	-0.59	-2.09	-2.34	-0.75	-2.84	0.62 KWD	0.89	8.02
Consumer Disc	1,486.17	0.76	3.83	6.40	7.29	11.19	0.14 KWD	0.94	0.00
Energy	1,088.00	1.20	4.92	6.59	1.92	-23.82	0.23 KWD	0.78	11.29
Technology	661.30	1.23	9.52	8.47	12.22	-3.30	0.01 KWD	0.81	0.00
Utilities	521.05	1.54	2.59	2.59	1.54	-13.16	0.22 KWD	1.83	16.28



### What Move the GCC markets

#### Oil Prices

Oil prices rose nearly 1% on Monday, extending gains from the previous session as China eased some of its strict Covid-19 protocols, fueling hopes of a recovery in economic activity and demand at the world's top crude importer. Brent crude futures rose 87 cents, or 0.9%, to \$96.86 a barrel.

#### Kuwait Market

The market closed up today by + 1.08% at 7,623.04 value traded 84.5 million KD, Premier market value traded reached 58.6 million KD and closed at 8,557.71 up by + 1.15%.

#### KSA Market

The market closed up today by +0.31% at 11,246.93.



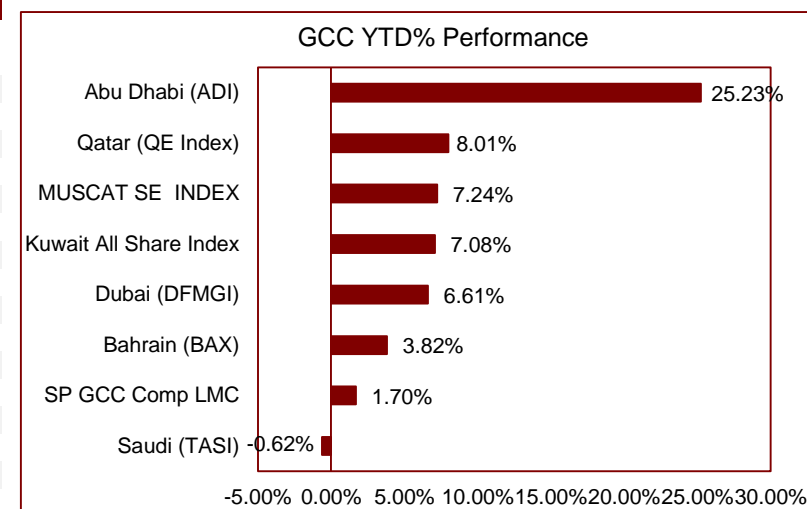
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.126	0.54	1.44	4.45	15.37	18.59	8.53 KWD	2.16	27.00
KFH	0.870	2.59	7.67	7.41	3.45	15.02	11.61 KWD	3.59	32.00
Zain	0.608	0.33	1.33	1.50	3.93	2.18	2.64 KWD	2.19	13.01
BOUBYAN BANK	0.842	0.48	2.56	2.18	10.07	18.20	3.16 KWD	3.34	34.00
Agility	0.808	0.62	3.86	3.06	20.96	2.60	2.17 KWD	1.38	2.56
<b>Saudi Arabia</b>									
ARAMCO	34.40	0.58	0.29	-1.43	-4.04	5.70	7,568.60 SAR	5.45	13.07
SABIC	84.60	0.83	-1.17	-4.30	-4.73	-27.07	253.82 SAR	1.39	35.00
STC	38.25	-0.13	-2.55	-5.32	-2.80	-14.92	191.27 SAR	2.60	15.90
AL-RAJHI BANK	84.00	-0.12	-0.36	-1.41	3.32	-5.22	336.03 SAR	3.90	22.12
NCB	56.50	2.91	-2.59	-4.88	-10.46	-12.27	253.03 SAR	1.54	13.24
<b>United Arab Emirates</b>									
ETISALAT.AD	25.70	1.98	5.33	-0.39	10.02	-18.93	n/a	n/a	n/a
FAB.AD	18.48	0.54	5.00	3.24	3.47	-0.76	204.15 AED	1.81	14.68
EMIRATES NBD	13.25	0.76	1.92	0.00	3.11	-2.21	83.69 AED	0.95	7.91
DB ISLAMIC BK	5.93	1.72	2.60	1.89	-0.84	10.22	42.94 AED	1.06	8.66
EMAAR PROPERT	6.37	1.59	4.77	5.12	10.02	30.27	52.10 AED	0.82	7.05
<b>Qatar</b>									
QNB	20.00	-0.60	0.86	0.30	0.50	-0.94	185.24 QAR	1.76	14.32
INDUSTRIES QAT	15.99	1.20	2.17	1.40	-5.38	3.23	97.01 QAR	2.39	10.19
QA ISLAMIC BK	24.90	-0.36	3.62	2.09	0.81	35.84	59.00 QAR	2.23	15.97
MASRAF AL RAYA	3.82	0.66	1.35	-0.47	-7.31	-17.69	35.61 QAR	1.47	23.90
MESAIEED PETRO	2.29	1.47	4.24	0.66	-2.77	9.33	28.79 QAR	1.67	15.15
<b>OMAN</b>									
BANK MUSCAT	0.297	4.21	0.34	3.85	3.48	28.86	2.23 OMR	1.03	8.33
OMANTEL	0.848	-4.50	0.00	0.95	-3.64	12.77	0.64 OMR	1.10	7.69
BANK DHOFAR	0.146	0.00	0.69	0.69	2.82	15.87	0.44 QAR	0.62	14.93
NAT BANK OF OMAN	0.253	-1.17	-0.78	-2.69	-6.30	28.43	0.41 QAR	0.71	12.71
OMINVEST	0.350	1.16	2.94	6.06	5.42	14.38	0.23 QAR	0.77	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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### Leading Sector, Security Performance

#### Kuwait

The market is up today by + 1.08 % The leading sector best performance indices today are Financial services 1.56 % Utilities 1.54 % Technology 1.23 % respectively

#### KSA

Saudi Armco has a positive performance today by + 0.58 %, SABIC have positive performance today by + 0.83%. STC have negative performance today by -0.13 %, Al Rajhi Bank have negative performance today by -0.12 %

#### U.A.E

ETISALAT .AD has a positive performance today by + 1.98 %, FAB.AD has a positive performance today by + 0.54 %



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