



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, November 16<sup>th</sup> 2022





Market Watch Wednesday, November 16, 2022

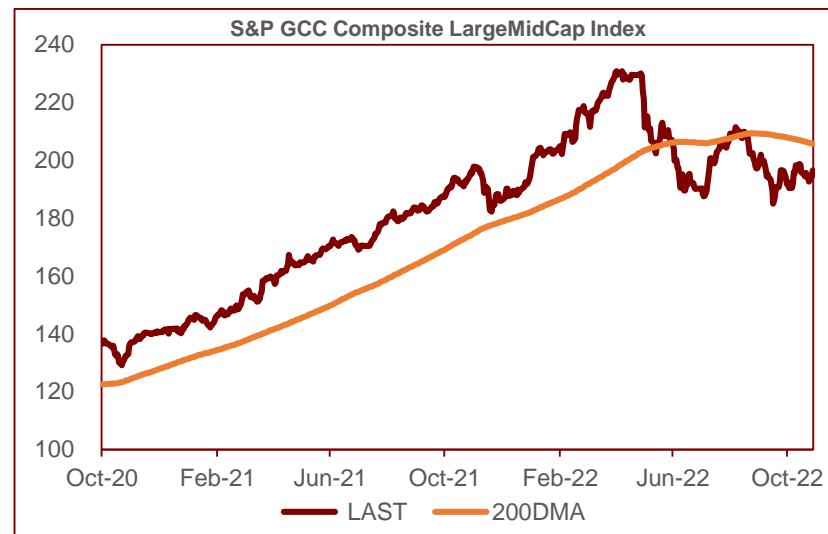
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,151.24	0.49	-2.52	-4.43	-2.23	-1.16	10,309 SAR	1.79	15.81
Qatar (QE Index)	12,290.98	-0.94	-0.12	-0.99	-3.18	5.72	621 QAR	1.41	14.28
Dubai (DFMGI)	3,344.31	-0.88	0.42	0.38	0.15	4.64	449 AED	1.21	12.73
Abu Dhabi (ADI)	10,482.28	-0.43	0.97	0.67	7.50	23.49	1,435 AED	2.09	19.22
Bahrain (BAX)	1,863.42	-0.13	0.07	-0.07	-0.99	3.68	19 BHD	0.00	15.28
MUSCAT SE INDEX	4,441.52	0.01	0.91	1.73	-1.92	7.55	5 OMR	0.00	13.25
SP GCC Comp LMC	191.10	-0.13	-0.80	-2.35	0.21	0.71			
SP UAE PRICE INDEX	144.44	-0.61	2.08	0.79	4.12	-2.05			

<b>Developed Markets</b>									
MSCI World Index	2,657.58	-0.77	7.69	4.31	11.73	-17.77			
U.S. (S&P 500)	3,958.79	-0.83	6.42	2.24	10.41	-16.94			
U.K. (FTSE 100)	7,351.19	-0.25	2.26	3.62	6.63	-0.45			
Japan (Topix)	1,963.29	-0.05	1.18	1.75	6.94	-1.46			

<b>Emerging Markets</b>									
MSCI EM Index	954.31	-0.66	10.85	12.51	8.97	-22.54			
China (SSE Composite)	3,119.98	-0.45	4.08	7.83	3.16	-14.28			
India (Sensex)	61,980.72	0.17	1.88	2.03	7.93	6.40			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,601.33	-0.76	3.21	3.87	6.97	7.92	49.09 KWD	2.35	29.80
Kuwait Premier Index	8,514.94	-0.83	3.32	3.96	7.11	11.47	38.89 KWD	2.54	26.31
Kuwait Main Index	5,682.02	-0.49	2.74	3.50	6.44	-3.47	10.20 KWD	1.59	43.16
NIC 50	9,099.17	0.00	3.31	3.95	7.10	6.77	28.60 KWD	2.52	25.31

<b>Kuwait Sector</b>									
Banking	1,862.38	-0.65	3.10	3.93	6.83	14.77	31.29 KWD	1.36	27.31
Telecom	1,251.56	-0.38	3.23	3.27	7.58	14.89	3.84 KWD	2.21	12.66
Industrials	1,123.68	-1.51	1.37	1.66	10.54	-1.56	3.98 KWD	0.82	19.12
Financial services	1,366.68	-1.14	6.51	7.13	9.01	-3.98	3.84 KWD	0.69	23.46
Real estate	1,276.55	-0.80	3.52	3.84	6.19	-3.76	2.75 KWD	0.61	22.40
Basic materials	877.38	-0.53	2.96	2.45	-2.66	-14.38	0.78 KWD	1.25	8.52
Health care	454.28	0.00	-3.90	-5.75	-1.19	-43.00	0.23 KWD	2.75	11.08
Consumer services	456.77	-1.48	1.46	0.39	-2.26	-37.52	0.76 KWD	1.02	11.46
Insurance	1,557.54	-0.09	2.36	2.10	3.76	1.57	0.64 KWD	0.91	8.19
Consumer Disc	1,466.49	-1.42	2.45	5.00	5.87	9.72	0.14 KWD	0.96	0.00
Energy	1,085.44	-1.23	4.67	6.34	1.68	-24.00	0.23 KWD	0.78	11.15
Technology	618.37	-2.52	2.41	1.43	4.94	-9.58	0.01 KWD	0.76	0.00
Utilities	515.79	-1.01	1.56	1.56	0.51	-14.04	0.22 KWD	1.82	16.12



### What Move the GCC markets

#### Oil Prices

Oil prices settled more than a dollar lower on Wednesday after Russian oil shipments via the Druzhba pipeline to Hungary restarted and as rising COVID-19 cases in China weighed on sentiment. Brent crude futures settled a dollar lower at \$92.86 a barrel.

#### Kuwait Market

The market closed down today by - 0.76% at 7,601.33 value traded 69.9 million KD, Premier market value traded reached 50.8 million KD and closed at 8,514.94 down by - 0.83%.

#### KSA Market

The market closed up today by + 0.49% at 11,151.24.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



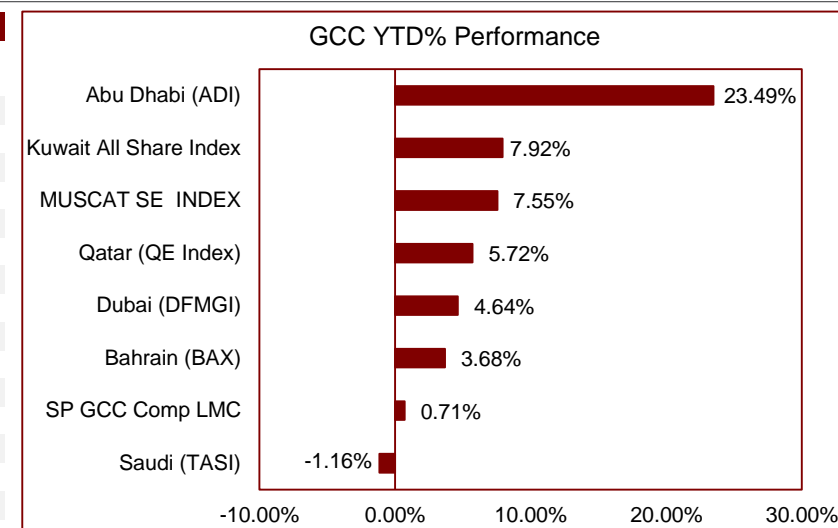
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.124	-0.44	1.26	4.27	15.16	18.38	8.49 KWD	2.16	27.00
KFH	0.859	-1.04	6.31	6.05	2.14	13.57	11.44 KWD	3.54	32.00
Zain	0.615	-1.13	2.50	2.67	5.13	3.36	2.66 KWD	2.21	13.16
BOUBYAN BANK	0.844	0.24	2.80	2.43	10.33	18.48	3.16 KWD	3.35	34.00
Agility	0.787	-2.11	1.16	0.38	17.81	-0.06	2.11 KWD	1.46	51.44
<b>Saudi Arabia</b>									
ARAMCO	33.70	1.66	-1.75	-3.44	-6.00	3.55	7,415.38 SAR	5.34	12.67
SABIC	84.00	-0.71	-1.87	-4.98	-5.41	-27.59	252.05 SAR	1.38	35.00
STC	38.00	0.53	-3.18	-5.94	-3.43	-15.48	190.04 SAR	2.59	15.69
AL-RAJHI BANK	84.60	0.24	0.36	-0.70	4.06	-4.54	338.46 SAR	3.93	22.20
NCB	53.80	0.19	-7.24	-9.43	-14.74	-16.46	240.96 SAR	1.47	12.95
<b>United Arab Emirates</b>									
ETISALAT.AD	25.60	0.23	4.92	-0.78	9.59	-19.24	222.11 AED	4.67	23.84
FAB.AD	17.88	-0.89	1.59	-0.11	0.11	-3.99	197.53 AED	1.76	14.21
EMIRATES NBD	13.20	0.00	1.54	-0.38	2.72	-2.58	83.38 AED	0.94	7.88
DB ISLAMIC BK	5.81	-0.51	0.52	-0.17	-2.84	7.99	42.07 AED	1.04	8.48
EMAAR PROPERT	6.14	-0.97	0.99	1.32	6.04	25.56	50.22 AED	0.77	7.07
<b>Qatar</b>									
QNB	19.40	-1.32	-2.17	-2.71	-2.51	-3.91	179.21 QAR	1.71	13.89
INDUSTRIES QAT	15.49	-0.45	-1.02	-1.78	-8.34	0.00	93.73 QAR	2.31	9.87
QA ISLAMIC BK	24.52	-1.72	2.04	0.53	-0.73	33.77	57.95 QAR	2.20	15.73
MASRAF AL RAYA	3.74	-1.06	-0.74	-2.53	-9.22	-19.40	34.79 QAR	1.44	23.40
MESAIEED PETRO	2.26	0.49	3.10	-0.44	-3.83	8.13	28.40 QAR	1.65	14.99
<b>OMAN</b>									
BANK MUSCAT	0.279	-0.36	-5.74	-2.45	-2.79	21.05	2.09 OMR	0.96	8.33
OMANTEL	0.848	-4.50	0.00	0.95	-3.64	12.77	0.64 OMR	1.08	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	0.255	2.00	0.00	-1.92	-5.56	29.44	0.41 QAR	0.71	12.71
OMINVEST	0.356	1.14	4.71	7.88	7.23	16.34	0.24 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Nov 22	24.46%	17.11%	0.06%	1.21%	0.37%	4.53%	17.78%	11.72%	5.86%	5.12%
16-Nov 22	24.56%	17.23%	0.06%	1.20%	0.36%	4.51%	17.74%	11.76%	5.87%	5.18%

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.76 % The leading sector bottom performance indices today are Technology -2.52 % Industrials -1.51 % Consumer services -1.48 % respectively

#### KSA

Saudi Armco has a positive performance today by + 1.66 %, SABIC have negative performance today by -0.70 %, STC has a positive performance today by + 0.53 %, Al Rajhi Bank has a positive performance today by + 0.24 %

#### U.A.E

ETISALAT .AD has a positive performance today by + 0.23 %, FAB.AD have negative performance today by -0.89 %



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