



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 1st 2022

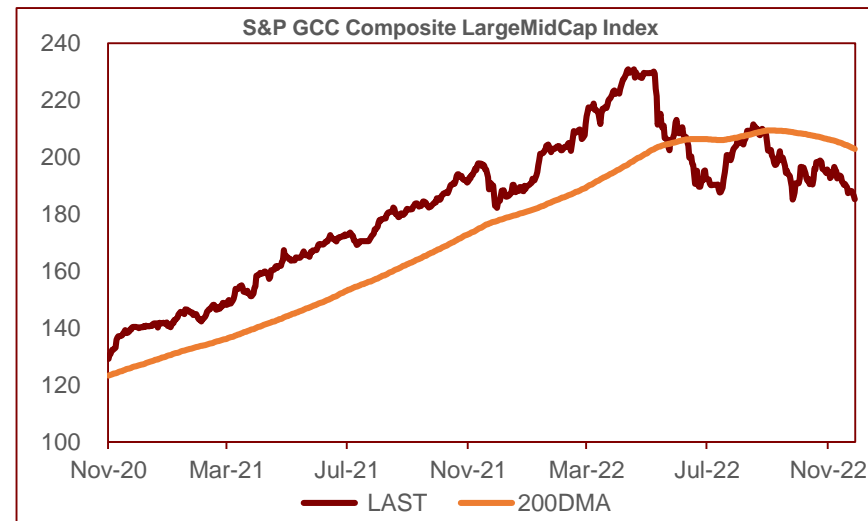




Market Watch

Thursday, December 1, 2022

| Description | Close | Day Δ | WTD | MTD | QTD | YTD | M Cap (in Bn) | PBV | PE |
|--------------------------|-----------|-------|-------|-------|-------|--------|---------------|------|-------|
| GCC Markets | | | | | | | | | |
| | | % | % | % | % | % | | | |
| Saudi (TASI) | 10,822.65 | -0.68 | -1.06 | -0.68 | -5.11 | -4.07 | 10,116 SAR | 1.69 | 15.63 |
| Qatar (QE Index) | 12,017.56 | 0.77 | 1.27 | 0.77 | -5.34 | 3.37 | 612 QAR | 1.36 | 13.95 |
| Dubai (DFMGI) | 3,323.96 | -0.04 | -0.04 | 0.00 | -0.45 | 4.01 | 443 AED | 1.23 | 12.93 |
| Abu Dhabi (ADI) | 10,552.37 | 0.17 | 0.17 | 0.00 | 8.22 | 24.32 | 1,435 AED | 2.06 | 19.69 |
| Bahrain (BAX) | 1,864.58 | -0.02 | 0.09 | -0.02 | -0.92 | 3.75 | 19 BHD | 1.77 | 15.30 |
| MUSCAT SE INDEX | 4,613.72 | 0.00 | 1.28 | 0.00 | 1.89 | 11.72 | 5 OMR | 0.94 | 13.25 |
| SP GCC Comp LMC | 187.33 | -0.38 | -0.46 | -0.38 | -1.78 | -1.29 | | | |
| SP UAE PRICE INDEX | 144.83 | 0.06 | 0.60 | 0.06 | 4.38 | -1.81 | | | |
| Developed Markets | | | | | | | | | |
| MSCI World Index | 2,733.03 | 0.74 | 1.30 | 0.74 | 15.24 | -15.18 | | | |
| U.S. (S&P 500) | 4,071.70 | -0.09 | 1.22 | -0.09 | 13.69 | -14.47 | | | |
| U.K. (FTSE 100) | 7,556.23 | -0.19 | 1.23 | -0.19 | 9.64 | 2.36 | | | |
| Japan (Topix) | 1,953.98 | 0.04 | -1.60 | 0.04 | 8.20 | -0.29 | | | |
| Emerging Markets | | | | | | | | | |
| MSCI EM Index | 973.85 | 0.62 | 3.46 | 0.62 | 11.71 | -20.59 | | | |
| China (SSE Composite) | 3,156.14 | 0.45 | 2.47 | 0.45 | 4.66 | -13.03 | | | |
| India (Sensex) | 62,868.50 | 0.29 | 1.62 | 0.29 | 10.20 | 8.64 | | | |
| Kuwait | | | | | | | | | |
| | | % | % | % | % | % | | | |
| Kuwait All Share Index | 7,566.53 | -0.24 | -0.26 | -0.24 | 6.49 | 7.43 | 48.91 KWD | 2.35 | 29.73 |
| Kuwait Premier Index | 8,461.37 | -0.36 | -0.29 | -0.36 | 6.43 | 10.76 | 38.72 KWD | 2.53 | 26.16 |
| Kuwait Main Index | 5,696.17 | 0.26 | -0.15 | 0.26 | 6.70 | -3.23 | 10.19 KWD | 1.66 | 43.36 |
| NIC 50 | 9,502.37 | -0.35 | -0.30 | -0.37 | 6.42 | 11.50 | 28.60 KWD | 2.51 | 25.16 |
| Kuwait Sector | | | | | | | | | |
| Banking | 1,857.57 | -0.39 | -0.43 | -0.39 | 6.56 | 14.47 | 31.28 KWD | 1.37 | 27.16 |
| Telecom | 1,221.52 | 0.61 | -0.24 | 0.61 | 5.00 | 12.13 | 3.74 KWD | 2.11 | 12.56 |
| Industrials | 1,128.72 | -0.66 | 0.78 | -0.66 | 11.03 | -1.12 | 3.98 KWD | 0.82 | 19.43 |
| Financial services | 1,337.68 | 0.37 | -0.36 | 0.37 | 6.70 | -6.02 | 3.75 KWD | 0.72 | 16.01 |
| Real estate | 1,274.88 | -0.52 | -0.08 | -0.52 | 6.05 | -3.88 | 2.74 KWD | 0.59 | 22.06 |
| Basic materials | 887.35 | 0.64 | 0.31 | 0.64 | -1.56 | -13.41 | 0.78 KWD | 1.28 | 8.61 |
| Health care | 454.28 | 0.00 | 0.00 | 0.00 | -1.19 | -43.00 | 0.22 KWD | 2.64 | 11.08 |
| Consumer services | 484.48 | -0.85 | 1.72 | -0.85 | 3.67 | -33.73 | 0.76 KWD | 0.96 | 11.67 |
| Insurance | 1,563.33 | 1.26 | 0.46 | 1.26 | 4.14 | 1.95 | 0.65 KWD | 0.84 | 9.24 |
| Consumer Disc | 1,469.82 | -0.63 | -0.92 | -0.63 | 6.11 | 9.96 | 0.15 KWD | 0.99 | 0.00 |
| Energy | 1,109.98 | 1.70 | 0.72 | 1.70 | 3.98 | -22.28 | 0.23 KWD | 0.82 | 4.78 |
| Technology | 763.87 | -0.94 | 12.90 | -0.94 | 29.63 | 11.70 | 0.01 KWD | 0.93 | 0.00 |
| Utilities | 518.42 | 0.00 | 1.03 | 0.00 | 1.03 | -13.60 | 0.22 KWD | 1.82 | 16.20 |



What Move the GCC markets

Oil Prices

Oil prices nosed ahead in early Asian trade on Thursday, lifted by signs of tighter supply and by optimism over a Chinese demand recovery. Brent crude futures rose 5 cents, or 0.06%, to \$87.02 per barrel.

Kuwait Market

The market closed down today by -0.24% at 7,566.53 value traded 38.2 million KD, Premier market value traded reached 27.8 million KD and closed at 8,461.37 down by -0.36%.

KSA Market

The market closed down today by -0.68% at 10,822.65.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



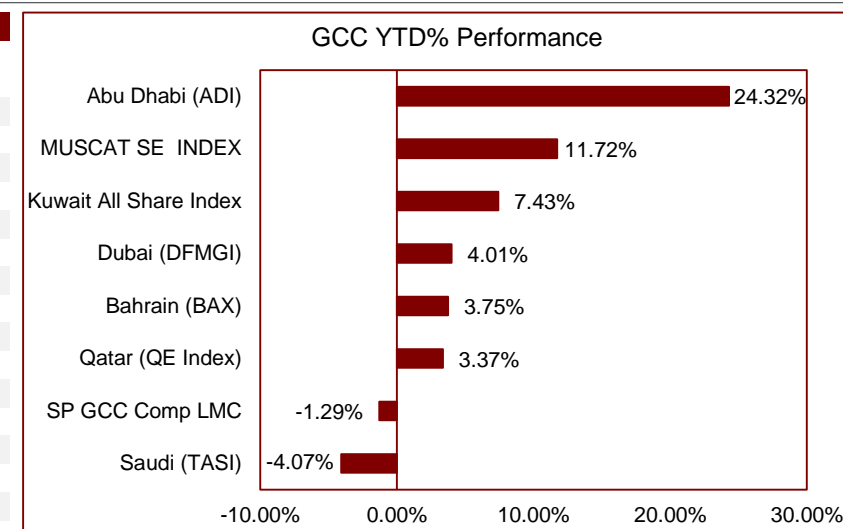
| Description | Close | Day Δ | WTD | MTD | QTD | YTD | M Cap (in Bn) | PBV | PE |
|-----------------------------|-------|-------|-------|-------|--------|--------|---------------|------|-------|
| | | % | % | % | % | % | | | |
| Blue Chip Watch | | | | | | | | | |
| Kuwait | | | | | | | | | |
| NBK | 1.121 | -0.09 | 0.09 | -0.09 | 14.86 | 18.06 | 8.47 KWD | 2.15 | 27.00 |
| KFH | 0.861 | -0.58 | -0.35 | -0.58 | 2.38 | 13.83 | 11.56 KWD | 3.55 | 32.00 |
| Zain | 0.587 | 0.00 | -1.01 | 0.00 | 0.34 | -1.34 | 2.54 KWD | 2.11 | 12.56 |
| BOUBYAN BANK | 0.835 | -1.07 | -1.07 | -1.07 | 9.15 | 17.22 | 3.12 KWD | 3.31 | 34.00 |
| Agility | 0.777 | -1.27 | 0.26 | -1.27 | 16.32 | -1.33 | 2.08 KWD | 1.44 | 50.78 |
| Saudi Arabia | | | | | | | | | |
| ARAMCO | 33.10 | -1.19 | -0.30 | -1.19 | -7.67 | 1.70 | 7,282.00 SAR | 5.24 | 12.80 |
| SABIC | 84.00 | 1.20 | -0.47 | 1.20 | -5.41 | -27.59 | 252.00 SAR | 1.38 | 35.00 |
| STC | 37.50 | -2.47 | -4.09 | -2.47 | -4.70 | -16.59 | 187.50 SAR | 2.55 | 15.96 |
| AL-RAJHI BANK | 80.10 | -0.50 | -3.26 | -0.50 | -1.48 | -9.62 | 320.40 SAR | 3.72 | 21.17 |
| NCB | 50.80 | -1.17 | -4.15 | -1.17 | -19.49 | -21.12 | 227.48 SAR | 1.39 | 12.40 |
| United Arab Emirates | | | | | | | | | |
| ETISALAT.AD | 25.80 | 2.22 | 2.22 | 2.22 | 10.45 | -18.61 | 224.37 AED | 4.72 | 24.08 |
| FAB.AD | 17.60 | -2.98 | -2.98 | -2.98 | -1.46 | -5.49 | 194.44 AED | 1.73 | 13.75 |
| EMIRATES NBD | 13.25 | 0.00 | 0.00 | 0.00 | 3.11 | -2.21 | 83.69 AED | 0.95 | 7.70 |
| DB ISLAMIC BK | 5.68 | -1.22 | -1.22 | -1.22 | -5.02 | 5.58 | 41.13 AED | 1.01 | 8.39 |
| EMAAR PROPERT | 6.08 | 0.66 | 0.66 | 0.66 | 5.01 | 24.34 | 49.73 AED | 0.76 | 6.85 |
| Qatar | | | | | | | | | |
| QNB | 19.52 | -0.41 | 1.93 | -0.41 | -1.91 | -3.32 | 180.30 QAR | 1.72 | 13.98 |
| INDUSTRIES QAT | 15.43 | 3.63 | 5.25 | 3.63 | -8.70 | -0.39 | 93.35 QAR | 2.31 | 9.83 |
| QA ISLAMIC BK | 24.20 | -0.33 | 4.58 | -0.33 | -2.02 | 32.02 | 57.18 QAR | 2.17 | 15.52 |
| MASRAF AL RAYA | 3.57 | 0.90 | -0.64 | 0.90 | -13.35 | -23.06 | 33.20 QAR | 1.37 | 22.34 |
| MESAIIEED PETRO | 2.29 | -1.85 | 3.02 | -1.85 | -2.68 | 9.43 | 28.73 QAR | 1.67 | 15.17 |
| OMAN | | | | | | | | | |
| BANK MUSCAT | 0.280 | 0.00 | 1.08 | 0.00 | -2.44 | 21.49 | 2.10 OMR | 0.97 | 8.33 |
| OMANTEL | 0.872 | -1.80 | 2.83 | 0.00 | -0.91 | 15.96 | 0.65 OMR | 1.11 | 7.69 |
| BANK DHOFAR | 0.155 | 0.00 | 1.97 | 0.00 | 9.15 | 23.02 | 0.46 QAR | 0.66 | 14.93 |
| NAT BANK OF OMAN | 0.288 | 0.00 | -0.69 | 0.00 | 6.67 | 46.19 | 0.47 QAR | 0.81 | 12.71 |
| OMINVEST | 0.392 | 0.00 | 5.38 | 0.00 | 18.07 | 28.10 | 0.26 QAR | 0.78 | 6.85 |

| Foreign Holding | | | | | | | | | | |
|-----------------|--------|--------|-------|-------|---------|-------|--------|--------|-------|-------|
| Date | NBK | GBK | CBK | ABK | MUTAHED | KIB | BURG | KFH | BOUB | WARBA |
| 23-Nov 22 | 24.57% | 17.29% | 0.06% | 1.21% | 0.36% | 4.51% | 17.73% | 11.82% | 5.90% | 5.19% |
| 30-Nov 22 | 24.59% | 17.27% | 0.06% | 1.21% | 0.36% | 4.55% | 17.72% | 11.86% | 5.90% | 5.19% |

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.24 % The leading sector bottom performance indices today are Technology -0.94 % Consumer services -0.85 % Industrials -0.66 % respectively

KSA

Saudi Armco have negative performance today by -1.19 %, SABIC have positive performance today by + 1.20 %, STC have negative performance today by -2.47 %, Al Rajhi Bank have negative performance today by -0.5 %

U.A.E

ETISALAT .AD has a positive performance today by + 2.22 %, FAB.AD has a negative performance today by - 2.98 %



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