



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, November 20<sup>th</sup> 2022

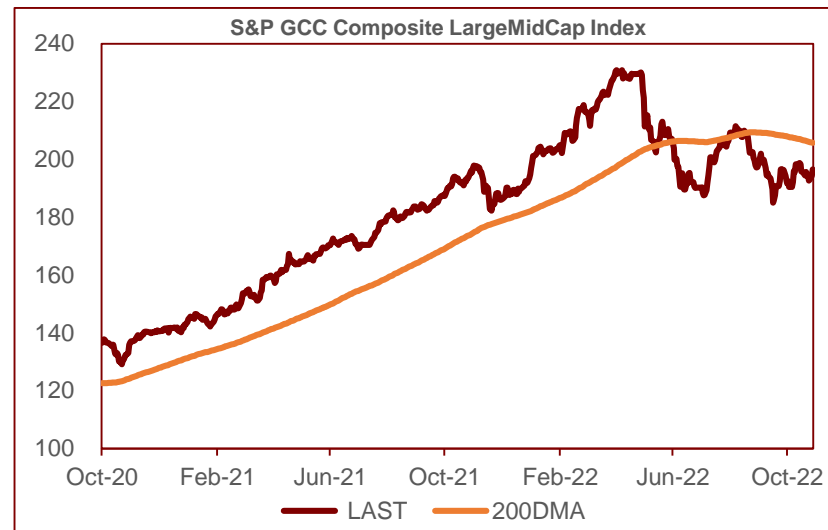




Market Watch Sunday, November 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,053.16	-0.80	-0.80	-5.27	-3.09	-2.03	10,268 SAR	1.76	16.28
Qatar (QE Index)	12,110.92	-0.84	-0.84	-2.44	-4.60	4.17	611 QAR	1.39	14.07
Dubai (DFMGI)	3,352.16	0.56	0.56	0.61	0.39	4.89	449 AED	1.22	13.22
Abu Dhabi (ADI)	10,466.15	0.40	0.40	0.52	7.34	23.30	1,435 AED	2.08	19.97
Bahrain (BAX)	1,861.28	-0.20	-0.20	-0.18	-1.10	3.56	19 BHD	0.00	15.30
MUSCAT SE INDEX	4,481.84	-0.09	-0.09	2.65	-1.03	8.53	5 OMR	0.00	13.25
SP GCC Comp LMC	189.32	-0.67	-0.51	-3.26	-0.73	-0.23			
SP UAE PRICE INDEX	143.98	0.00	0.81	0.46	3.79	-2.37			
<b>Developed Markets</b>									
MSCI World Index	2,658.90	0.00	0.63	4.36	11.78	-17.73			
U.S. (S&P 500)	3,965.34	0.00	0.48	2.41	10.59	-16.80			
U.K. (FTSE 100)	7,385.52	0.00	0.53	4.10	7.13	0.01			
Japan (Topix)	1,967.03	0.00	0.04	1.95	7.14	-1.27			
<b>Emerging Markets</b>									
MSCI EM Index	943.01	0.07	0.07	11.18	7.68	-23.46			
China (SSE Composite)	3,097.24	-0.58	-0.58	7.04	2.41	-14.91			
India (Sensex)	61,663.48	-0.14	-0.14	1.51	7.38	5.85			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,595.59	-0.20	-0.20	3.79	6.89	7.84	49.05 KWD	2.35	30.03
Kuwait Premier Index	8,506.63	-0.19	-0.19	3.85	7.00	11.36	38.86 KWD	2.54	26.23
Kuwait Main Index	5,682.97	-0.20	-0.20	3.52	6.45	-3.45	10.19 KWD	1.62	44.61
NIC 50	9,539.90	-0.11	-0.20	3.84	6.99	11.94	28.60 KWD	2.52	25.23
<b>Kuwait Sector</b>									
Banking	1,857.48	-0.18	-0.18	3.66	6.55	14.46	31.22 KWD	1.39	27.23
Telecom	1,250.96	-0.54	-0.54	3.22	7.53	14.83	3.84 KWD	2.20	12.70
Industrials	1,123.32	-0.24	-0.24	1.63	10.50	-1.59	3.98 KWD	0.85	18.85
Financial services	1,373.42	-0.51	-0.51	7.66	9.55	-3.51	3.84 KWD	0.71	18.23
Real estate	1,280.01	-0.04	-0.04	4.12	6.48	-3.50	2.76 KWD	0.60	22.30
Basic materials	879.27	0.22	0.22	2.67	-2.45	-14.20	0.78 KWD	1.25	9.22
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	484.48	5.21	5.21	6.48	3.67	-33.73	0.76 KWD	1.00	11.28
Insurance	1,562.05	0.64	0.64	2.40	4.06	1.87	0.65 KWD	0.82	9.30
Consumer Disc	1,478.89	0.23	0.23	5.88	6.76	10.64	0.15 KWD	0.99	0.00
Energy	1,082.15	-1.42	-1.42	6.02	1.37	-24.23	0.23 KWD	0.80	4.86
Technology	675.85	8.15	8.15	10.86	14.69	-1.17	0.01 KWD	0.83	0.00
Utilities	518.42	0.51	0.51	2.07	1.03	-13.60	0.22 KWD	1.82	16.20



### What Move the GCC markets

#### Oil Prices

Oil dropped by more than \$2 a barrel on Friday, on track for a second weekly decline, due to concern about weakened demand in China and further increases to U.S. interest rates. Brent crude was down \$2.82, or 3.1%, at \$86.96 a barrel

#### Kuwait Market

The market closed down today by - 0.20% at 7,595.59 value traded 34.1 million KD, Premier market value traded reached 22.4 million KD and closed at 8,506.63 down by - 0.19%.

#### KSA Market

The market closed down today by - 0.80% at 11,053.16.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



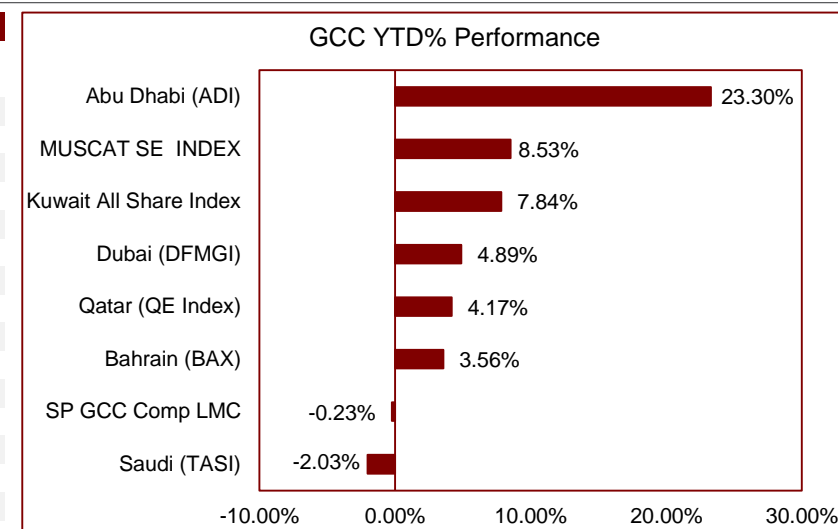
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.115	-0.18	-0.18	3.43	14.24	17.43	8.43 KWD	2.14	27.00
KFH	0.861	-0.12	-0.12	6.30	2.38	13.83	11.47 KWD	3.55	32.00
Zain	0.611	-0.97	-0.97	2.00	4.44	2.69	2.65 KWD	2.20	13.08
BOUBYAN BANK	0.845	0.24	0.24	2.55	10.46	18.62	3.16 KWD	3.35	34.00
Agility	0.782	-0.64	-0.64	-0.26	17.07	-0.70	2.09 KWD	1.45	51.11
<b>Saudi Arabia</b>									
ARAMCO	33.65	-0.15	-0.15	-3.58	-6.14	3.39	7,403.00 SAR	5.33	12.88
SABIC	83.80	-1.30	-1.30	-5.20	-5.63	-27.76	251.40 SAR	1.37	35.00
STC	37.80	0.40	0.40	-6.44	-3.94	-15.93	189.00 SAR	2.57	15.63
AL-RAJHI BANK	83.50	-1.18	-1.18	-2.00	2.71	-5.78	334.00 SAR	3.88	22.22
NCB	53.60	-1.65	-1.65	-9.76	-15.06	-16.77	240.02 SAR	1.46	13.14
<b>United Arab Emirates</b>									
ETISALAT.AD	25.46	0.55	0.55	-1.32	8.99	-19.68	221.41 AED	4.65	23.77
FAB.AD	17.66	2.08	2.08	-1.34	-1.12	-5.17	195.10 AED	1.73	14.03
EMIRATES NBD	13.15	0.00	0.00	-0.75	2.33	-2.95	83.06 AED	0.94	7.85
DB ISLAMIC BK	5.84	1.04	1.04	0.34	-2.34	8.55	42.29 AED	1.04	8.53
EMAAR PROPERT	6.17	0.33	0.33	1.82	6.56	26.18	50.47 AED	0.78	7.11
<b>Qatar</b>									
QNB	19.17	0.16	0.16	-3.86	-3.67	-5.05	177.00 QAR	1.69	13.73
INDUSTRIES QAT	15.07	-1.57	-1.57	-4.44	-10.83	-2.71	91.14 QAR	2.25	9.60
QA ISLAMIC BK	24.21	-1.18	-1.18	-0.74	-1.98	32.08	57.19 QAR	2.17	15.53
MASRAF AL RAYA	3.69	-0.54	-0.54	-3.83	-10.44	-20.47	34.31 QAR	1.42	23.09
MESAIEED PETRO	2.23	-0.89	-0.89	-1.76	-5.11	6.70	28.01 QAR	1.63	14.79
<b>OMAN</b>									
BANK MUSCAT	0.279	-1.06	-1.06	-2.45	-2.79	21.05	2.09 OMR	0.96	8.33
OMANTEL	0.856	-3.60	0.00	1.90	-2.73	13.83	0.64 OMR	1.09	7.69
BANK DHOFAR	0.146	0.00	0.00	0.69	2.82	15.87	0.44 QAR	0.62	14.93
NAT BANK OF OMAN	0.270	0.00	0.00	3.85	0.00	37.06	0.44 QAR	0.76	12.71
OMINVEST	0.358	0.56	0.56	8.48	7.83	16.99	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 -0.2 % The leading sector bottom performance indices today are Energy -1.42 % Telecom -0.54 % Financial services -0.51 % respectively

#### KSA

Saudi Armco has a negative performance today by -0.15 %, SABIC have negative performance today by -1.30 %, STC has a positive performance today by + 0.40 %, Al Rajhi Bank have negative performance today by -1.18 %

#### U.A.E

ETISALAT .AD has a positive performance today by 0.55 %, FAB.AD has a positive performance today by 2.08 %



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