

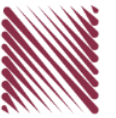


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, November 21st 2022





Market Watch Monday, November 21, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,930.51	-1.11	-1.90	-6.32	-4.16	-3.11	10,121 SAR	1.74	16.12
Qatar (QE Index)	11,853.13	-2.13	-2.95	-4.52	-6.63	1.96	598 QAR	1.36	13.71
Dubai (DFMGI)	3,339.25	-0.39	0.17	0.22	0.00	4.49	447 AED	1.21	13.05
Abu Dhabi (ADI)	10,399.28	-0.64	-0.25	-0.12	6.65	22.51	1,435 AED	2.06	19.80
Bahrain (BAX)	1,862.66	0.07	-0.12	-0.11	-1.03	3.64	19 BHD	0.00	15.30
MUSCAT SE INDEX	4,500.55	0.42	0.32	3.08	-0.61	8.98	5 OMR	0.00	13.25
SP GCC Comp LMC	187.38	-1.02	-1.53	-4.25	-1.74	-1.25			
SP UAE PRICE INDEX	142.83	-0.80	0.00	-0.34	2.96	-3.15			

Developed Markets

MSCI World Index	2,640.44	-0.69	-0.07	3.64	11.01	-18.30			
U.S. (S&P 500)	3,949.94	-0.39	0.09	2.01	10.16	-17.13			
U.K. (FTSE 100)	7,376.85	-0.12	0.41	3.98	7.01	-0.10			
Japan (Topix)	1,972.57	0.28	0.32	2.24	7.44	-0.99			

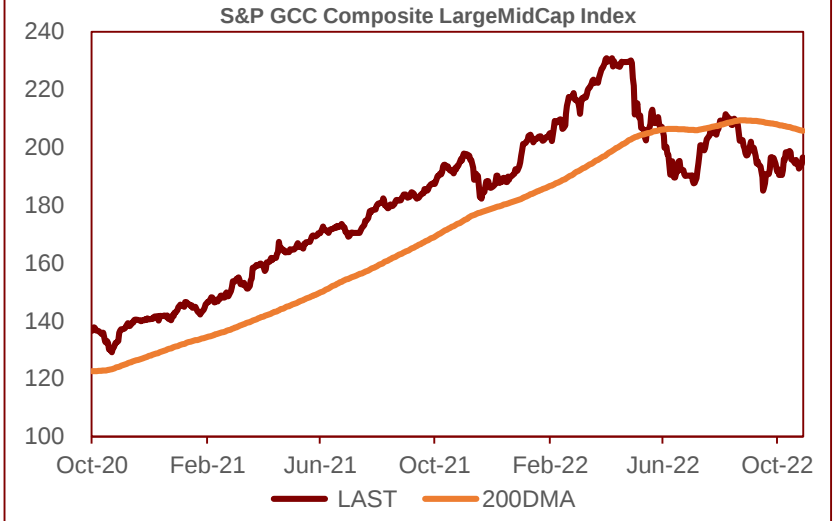
Emerging Markets

MSCI EM Index	931.05	-1.27	-1.20	9.77	6.31	-24.43			
China (SSE Composite)	3,085.04	-0.39	-0.98	6.62	2.01	-15.24			
India (Sensex)	61,144.84	-0.84	-0.98	0.66	6.47	4.96			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,578.50	-0.22	-0.42	3.55	6.65	7.60	48.94 KWD	2.35	29.94
Kuwait Premier Index	8,486.75	-0.23	-0.43	3.61	6.75	11.10	38.77 KWD	2.53	26.23
Kuwait Main Index	5,672.20	-0.19	-0.39	3.33	6.25	-3.64	10.17 KWD	1.62	44.16
NIC 50	9,517.78	-0.23	-0.44	3.60	6.74	11.68	28.60 KWD	2.51	25.23

Kuwait Sector

Banking	1,860.27	0.15	-0.03	3.82	6.71	14.64	31.27 KWD	1.40	27.23
Telecom	1,217.21	-2.70	-3.23	0.43	4.63	11.74	3.74 KWD	2.13	12.64
Industrials	1,120.61	-0.24	-0.48	1.38	10.23	-1.83	3.96 KWD	0.85	18.86
Financial services	1,363.50	-0.72	-1.23	6.88	8.75	-4.20	3.82 KWD	0.70	18.19
Real estate	1,274.53	-0.43	-0.47	3.68	6.02	-3.91	2.75 KWD	0.60	21.81
Basic materials	881.55	0.26	0.48	2.94	-2.20	-13.98	0.78 KWD	1.25	9.24
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	479.71	-0.98	4.17	5.43	2.65	-34.39	0.77 KWD	1.01	11.42
Insurance	1,537.16	-1.59	-0.97	0.76	2.40	0.25	0.64 KWD	0.79	9.30
Consumer Disc	1,486.15	0.49	0.72	6.40	7.29	11.19	0.15 KWD	1.00	0.00
Energy	1,103.09	1.94	0.49	8.07	3.33	-22.76	0.23 KWD	0.81	4.82
Technology	659.84	-2.37	5.59	8.23	11.98	-3.51	0.01 KWD	0.81	0.00
Utilities	518.42	0.00	0.51	2.07	1.03	-13.60	0.22 KWD	1.82	16.20



What Move the GCC markets

Oil Prices

Oil prices dropped to trade near two-month lows on Monday, having earlier slid by around \$1 a barrel, as supply fears receded while concerns over fuel demand from China and U.S. dollar strength weighed on prices. Brent crude futures for January had slipped 54 cents, or 0.7%, to \$87.05

Kuwait Market

The market closed down today by – 0.22% at 7,578.50 value traded 40.2 million KD, Premier market value traded reached 31.4 million KD and closed at 8,486.75 down by – 0.23%.

KSA Market

The market closed down today by – 1.11% at 10,930.51.



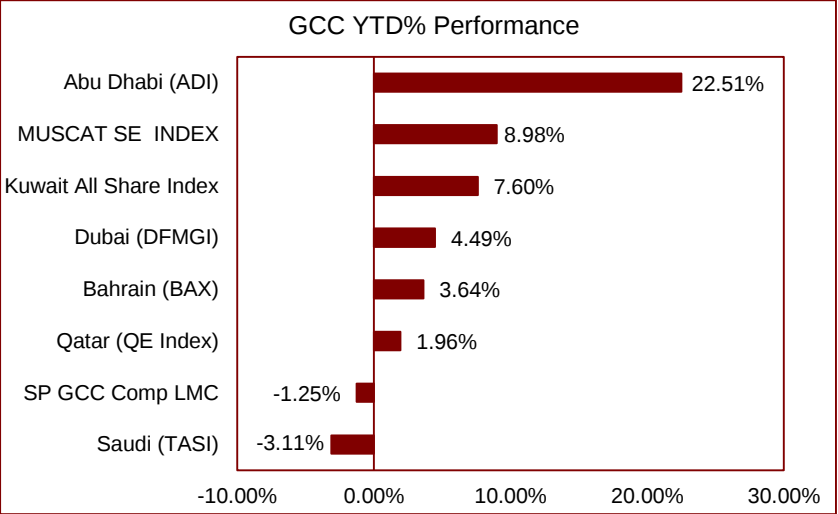
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.118	0.27	0.09	3.71	14.55	17.74	8.45 KWD	2.15	27.00
KFH	0.862	0.12	0.00	6.42	2.50	13.97	11.48 KWD	3.56	32.00
Zain	0.593	-2.95	-3.89	-1.00	1.37	-0.34	2.57 KWD	2.13	12.69
BOUBYAN BANK	0.843	-0.24	0.00	2.31	10.20	18.34	3.15 KWD	3.34	34.00
Agility	0.779	-0.38	-1.02	-0.64	16.62	-1.08	2.09 KWD	1.44	50.92
Saudi Arabia									
ARAMCO	33.10	-1.63	-1.78	-5.16	-7.67	1.70	7,282.00 SAR	5.24	12.86
SABIC	82.00	-2.15	-3.42	-7.24	-7.66	-29.31	246.00 SAR	1.35	35.00
STC	37.95	0.40	0.80	-6.06	-3.56	-15.59	189.75 SAR	2.58	15.69
AL-RAJHI BANK	83.20	-0.36	-1.54	-2.35	2.34	-6.12	332.80 SAR	3.87	21.96
NCB	52.60	-1.87	-3.49	-11.45	-16.64	-18.32	235.54 SAR	1.44	12.93
United Arab Emirates									
ETISALAT.AD	25.20	-1.02	-0.47	-2.33	7.88	-20.50	221.41 AED	4.65	23.77
FAB.AD	17.46	-1.13	0.92	-2.46	-2.24	-6.24	192.89 AED	1.71	13.87
EMIRATES NBD	13.15	0.00	0.00	-0.75	2.33	-2.95	83.06 AED	0.94	7.85
DB ISLAMIC BK	5.80	-0.68	0.35	-0.34	-3.01	7.81	42.00 AED	1.04	8.47
EMAAR PROPERT	6.12	-0.81	-0.49	0.99	5.70	25.15	50.06 AED	0.77	7.05
Qatar									
QNB	18.65	-2.71	-2.56	-6.47	-6.28	-7.63	172.18 QAR	1.64	13.36
INDUSTRIES QAT	14.70	-2.46	-3.98	-6.79	-13.02	-5.10	88.90 QAR	2.20	9.36
QA ISLAMIC BK	23.99	-0.91	-2.08	-1.64	-2.87	30.88	56.66 QAR	2.15	15.39
MASRAF AL RAYA	3.60	-2.47	-2.99	-6.20	-12.65	-22.44	33.46 QAR	1.38	22.52
MESAIEED PETRO	2.18	-2.24	-3.11	-3.96	-7.23	4.31	27.38 QAR	1.60	14.46
OMAN									
BANK MUSCAT	0.280	0.36	-0.71	-2.10	-2.44	21.49	2.11 OMR	0.97	8.33
OMANTEL	0.836	-5.86	-2.34	-0.48	-5.00	11.17	0.63 OMR	1.06	7.69
BANK DHOFAR	0.150	2.74	2.74	3.45	5.63	19.05	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.280	3.70	3.70	7.69	3.70	42.13	0.46 QAR	0.78	12.71
OMINVEST	0.364	1.68	2.25	10.30	9.64	18.95	0.24 QAR	0.72	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.22 %The leading sector bottom performance indices today are Telecom -2.7 % Technology -2.37 % Insurance -1.59 % respectively

KSA

Saudi Armco has a negative performance today by -1.63 %, SABIC has a negative performance today by -2.15 %, STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a negative performance today by -0.36 %

U.A.E

ETISALAT .AD has a negative performance today by -1.02 %, FAB.AD has a negative performance today by -1.13 %



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