

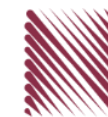


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

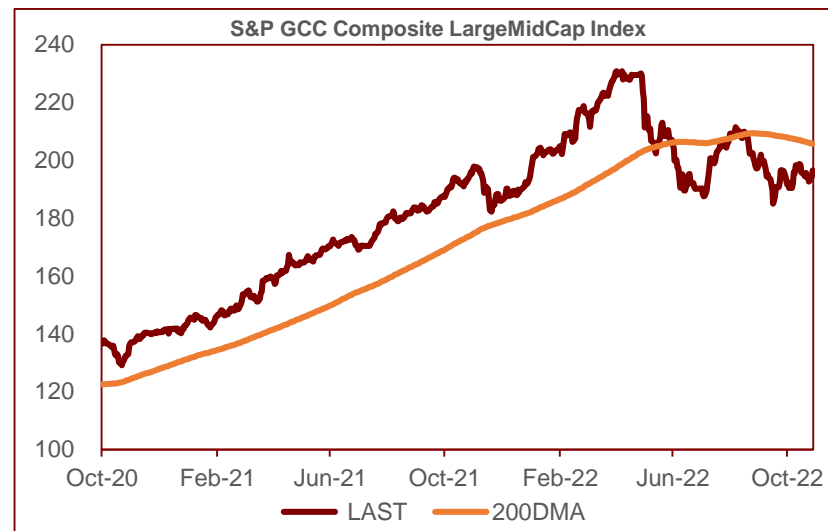
Tuesday, November 22nd 2022





Market Watch Tuesday, November 22, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,965.41	0.32	-1.59	-6.02	-3.86	-2.80	10,195 SAR	1.73	16.02
Qatar (QE Index)	11,827.93	-0.21	-3.15	-4.72	-6.83	1.74	599 QAR	1.35	13.82
Dubai (DFMGI)	3,330.09	-0.27	-0.10	-0.05	-0.27	4.20	446 AED	1.22	13.00
Abu Dhabi (ADI)	10,392.58	-0.06	-0.31	-0.19	6.58	22.43	1,435 AED	2.06	19.50
Bahrain (BAX)	1,863.49	0.04	-0.08	-0.06	-0.98	3.69	19 BHD	1.77	15.30
MUSCAT SE INDEX	4,504.49	0.09	0.41	3.17	-0.53	9.08	5 OMR	0.92	13.25
SP GCC Comp LMC	187.68	0.16	-1.37	-4.10	-1.58	-1.09			
SP UAE PRICE INDEX	142.58	-0.17	-0.17	-0.51	2.78	-3.31			
Developed Markets									
MSCI World Index	2,675.46	1.33	1.25	5.01	12.48	-17.21			
U.S. (S&P 500)	4,003.58	1.36	1.44	3.40	11.66	-16.00			
U.K. (FTSE 100)	7,452.84	1.03	1.45	5.05	8.11	0.92			
Japan (Topix)	1,994.75	1.12	1.45	3.39	8.65	0.12			
Emerging Markets									
MSCI EM Index	927.42	-0.39	-1.59	9.34	5.90	-24.72			
China (SSE Composite)	3,088.94	0.13	-0.85	6.76	2.13	-15.13			
India (Sensex)	61,418.96	0.45	-0.54	1.11	6.95	5.43			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,572.13	-0.08	-0.50	3.47	6.56	7.51	48.83 KWD	2.35	29.93
Kuwait Premier Index	8,483.71	-0.04	-0.46	3.57	6.72	11.06	38.69 KWD	2.53	26.22
Kuwait Main Index	5,656.17	-0.28	-0.67	3.03	5.95	-3.91	10.14 KWD	1.63	44.18
NIC 50	9,510.11	-0.08	-0.47	3.56	6.71	11.59	28.60 KWD	2.51	25.22
Kuwait Sector									
Banking	1,861.15	0.05	0.02	3.86	6.76	14.69	31.24 KWD	1.39	27.22
Telecom	1,205.06	-1.00	-4.19	-0.57	3.58	10.62	3.69 KWD	2.13	12.62
Industrials	1,116.69	-0.35	-0.83	1.03	9.85	-2.17	3.94 KWD	0.84	18.75
Financial services	1,358.47	-0.37	-1.60	6.49	8.35	-4.56	3.81 KWD	0.69	18.12
Real estate	1,271.83	-0.21	-0.68	3.46	5.80	-4.11	2.74 KWD	0.59	21.73
Basic materials	883.05	0.17	0.65	3.11	-2.03	-13.83	0.78 KWD	1.25	9.26
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	476.63	-0.64	3.50	4.75	1.99	-34.81	0.77 KWD	0.98	11.74
Insurance	1,584.26	3.06	2.07	3.85	5.54	3.32	0.66 KWD	0.87	9.33
Consumer Disc	1,487.04	0.06	0.78	6.47	7.35	11.25	0.15 KWD	0.99	0.00
Energy	1,095.60	-0.68	-0.19	7.33	2.63	-23.29	0.23 KWD	0.80	4.78
Technology	712.95	8.05	14.09	16.95	20.99	4.26	0.01 KWD	0.87	0.00
Utilities	513.16	-1.01	-0.51	1.04	0.00	-14.47	0.21 KWD	1.81	16.04



What Move the GCC markets

Oil Prices

Oil rose on Tuesday after top exporter Saudi Arabia said OPEC+ was sticking with output cuts and could take further steps to balance the market, outweighing global recession worries and concern about China's rising Covid-19 case numbers. Brent crude rose \$1.20, or 1.4%, to \$88.65.

Kuwait Market

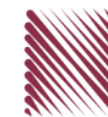
The market closed down today by -0.08% at 7,572.13 value traded 40.9 million KD, Premier market value traded reached 29.8 million KD and closed at 8,483.71 down by -0.04%.

KSA Market

The market closed up today by +0.32% at 10,965.41.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



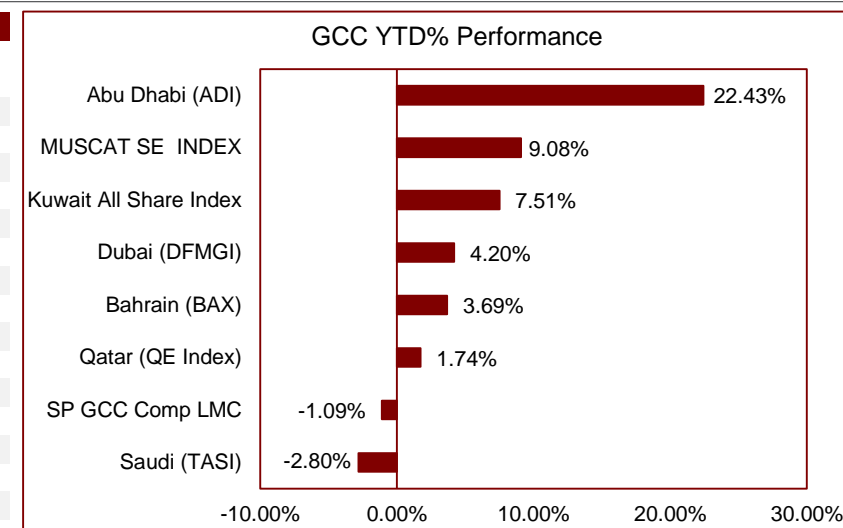
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.118	0.00	0.09	3.71	14.55	17.74	8.44 KWD	2.15	27.00
KFH	0.863	0.12	0.12	6.54	2.62	14.10	11.48 KWD	3.56	32.00
Zain	0.591	-0.34	-4.21	-1.34	1.03	-0.67	2.56 KWD	2.13	12.65
BOUBYAN BANK	0.845	0.24	0.24	2.55	10.46	18.62	3.16 KWD	3.35	34.00
Agility	0.773	-0.77	-1.78	-1.40	15.72	-1.84	2.07 KWD	1.43	50.52
Saudi Arabia									
ARAMCO	33.40	0.91	-0.89	-4.30	-6.83	2.63	7,348.00 SAR	5.29	12.65
SABIC	82.90	1.10	-2.36	-6.22	-6.64	-28.53	248.70 SAR	1.36	35.00
STC	39.00	2.77	3.59	-3.47	-0.89	-13.26	195.00 SAR	2.65	15.75
AL-RAJHI BANK	82.90	-0.36	-1.89	-2.70	1.97	-6.46	331.60 SAR	3.85	21.88
NCB	52.80	0.38	-3.12	-11.11	-16.32	-18.01	236.44 SAR	1.44	12.68
United Arab Emirates									
ETISALAT.AD	25.00	-0.79	-1.26	-3.10	7.02	-21.14	219.15 AED	4.61	23.52
FAB.AD	17.48	0.11	1.04	-2.35	-2.13	-6.13	193.11 AED	1.72	13.89
EMIRATES NBD	13.20	0.38	0.38	-0.38	2.72	-2.58	83.38 AED	0.94	7.88
DB ISLAMIC BK	5.75	-0.86	-0.52	-1.20	-3.85	6.88	41.63 AED	1.03	8.39
EMAAR PROPERT	6.12	0.00	-0.49	0.99	5.70	25.15	50.06 AED	0.77	7.05
Qatar									
QNB	18.95	1.61	-0.99	-4.96	-4.77	-6.14	175.17 QAR	1.67	13.57
INDUSTRIES QAT	14.58	-0.82	-4.77	-7.55	-13.73	-5.87	88.28 QAR	2.18	9.29
QA ISLAMIC BK	23.52	-1.96	-4.00	-3.57	-4.78	28.31	55.62 QAR	2.11	15.09
MASRAF AL RAYA	3.56	-1.14	-4.10	-7.27	-13.64	-23.32	33.12 QAR	1.37	22.27
MESAIEED PETRO	2.23	2.06	-1.11	-1.98	-5.32	6.46	27.98 QAR	1.63	14.75
OMAN									
BANK MUSCAT	0.275	-1.79	-2.48	-3.85	-4.18	19.32	2.06 OMR	0.95	8.33
OMANTEL	0.844	-4.95	-1.40	0.48	-4.09	12.23	0.63 OMR	1.07	7.69
BANK DHOFAR	0.150	0.00	2.74	3.45	5.63	19.05	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.283	1.07	4.81	8.85	4.81	43.65	0.46 QAR	0.79	12.71
OMINVEST	0.364	0.00	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.08 % The leading sector bottom performance indices today are Utilities -1.01 % Telecom -1 % Energy -0.68 % respectively

KSA

Saudi Armco has a positive performance today by + 0.91 %, SABIC have positive performance today by + 1.09 %, STC has a positive performance today by + 2.77 %, Al Rajhi Bank have negative performance today by -0.36 %

U.A.E

ETISALAT .AD have negative performance today by -0.79 %, FAB.AD has a positive performance today by + 0.11 %



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