

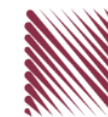


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, November 23rd 2022





Market Watch

Wednesday, November 23, 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	16.14
Qatar (QE Index)	11,896.70	0.58	-2.59	-4.17	-6.29	2.33	602 QAR	1.37	13.79
Dubai (DFMGI)	3,326.21	-0.12	-0.22	-0.17	-0.39	4.08	446 AED	1.23	13.04
Abu Dhabi (ADI)	10,528.73	1.31	1.00	1.12	7.98	24.04	1,435 AED	2.07	19.59
Bahrain (BAX)	1,863.82	0.02	-0.06	-0.04	-0.97	3.70	19 BHD	1.77	15.31
MUSCAT SE INDEX	4,543.76	0.87	1.29	4.07	0.34	10.03	5 OMR	0.93	13.25
SP GCC Comp LMC	188.07	0.21	-1.17	-3.90	-1.38	-0.89			
SP UAE PRICE INDEX	143.64	0.74	0.57	0.23	3.54	-2.60			

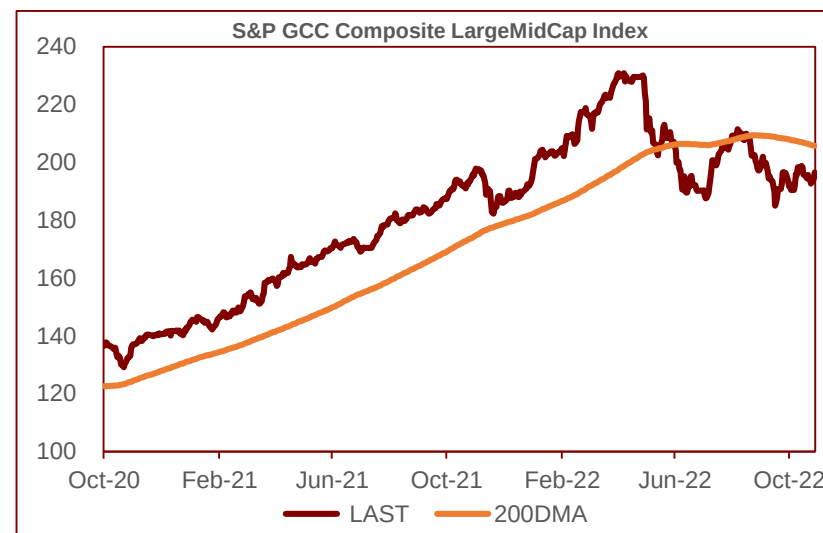
Developed Markets

MSCI World Index	2,697.39	0.82	2.08	5.87	13.40	-16.53			
U.S. (S&P 500)	4,027.26	0.59	2.04	4.01	12.32	-15.50			
U.K. (FTSE 100)	7,465.24	0.17	1.62	5.23	8.29	1.09			
Japan (Topix)	1,994.75	0.00	1.45	3.39	8.65	0.12			

Emerging Markets

MSCI EM Index	932.30	0.53	-1.07	9.92	6.45	-24.33			
China (SSE Composite)	3,096.91	0.26	-0.59	7.03	2.40	-14.91			
India (Sensex)	61,510.58	0.15	-0.39	1.26	7.11	5.59			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,555.34	-0.22	-0.72	3.24	6.33	7.27	48.72 KWD	2.35	29.86
Kuwait Premier Index	8,459.27	-0.29	-0.75	3.28	6.41	10.74	38.58 KWD	2.53	26.15
Kuwait Main Index	5,659.12	0.05	-0.62	3.09	6.01	-3.86	10.14 KWD	1.66	44.06
NIC 50	9,490.40	-0.21	-0.76	3.27	6.40	11.59	28.60 KWD	2.51	25.15
Kuwait Sector									
Banking	1,857.93	-0.17	-0.15	3.68	6.58	14.49	31.18 KWD	1.40	27.15
Telecom	1,217.38	1.02	-3.21	0.45	4.64	11.75	3.73 KWD	2.14	12.66
Industrials	1,112.05	-0.42	-1.24	0.61	9.39	-2.58	3.92 KWD	0.84	18.72
Financial services	1,339.56	-1.39	-2.97	5.00	6.85	-5.88	3.75 KWD	0.69	18.12
Real estate	1,270.96	-0.07	-0.75	3.39	5.72	-4.18	2.74 KWD	0.59	21.78
Basic materials	882.49	-0.06	0.58	3.05	-2.10	-13.88	0.78 KWD	1.25	8.56
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	471.15	-1.15	2.31	3.55	0.82	-35.56	0.76 KWD	0.97	11.64
Insurance	1,560.57	-1.50	0.54	2.30	3.96	1.77	0.65 KWD	0.83	9.33
Consumer Disc	1,479.11	-0.53	0.24	5.90	6.78	10.66	0.14 KWD	0.98	0.00
Energy	1,104.78	0.84	0.64	8.23	3.49	-22.64	0.23 KWD	0.81	4.82
Technology	643.84	-9.69	3.03	5.61	9.26	-5.85	0.01 KWD	0.79	0.00
Utilities	515.79	0.51	0.00	1.56	0.51	-14.04	0.22 KWD	1.82	16.12



What Move the GCC markets

Oil Prices

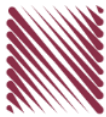
Oil prices rose in early trade on Wednesday after industry data showed U.S. crude stockpiles fell more sharply than expected last week, highlighting supply tightness ahead of a looming European Union ban and G7 price cap on Russian oil. Brent crude futures gained 25 cents, or 0.3%, to \$88.61 a barrel

Kuwait Market

The market closed down today by – 0.22% at 7,555.34 value traded 39.5 million KD, Premier market value traded reached 31.5 million KD and closed at 8,459.27 down by – 0.29%.

KSA Market

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



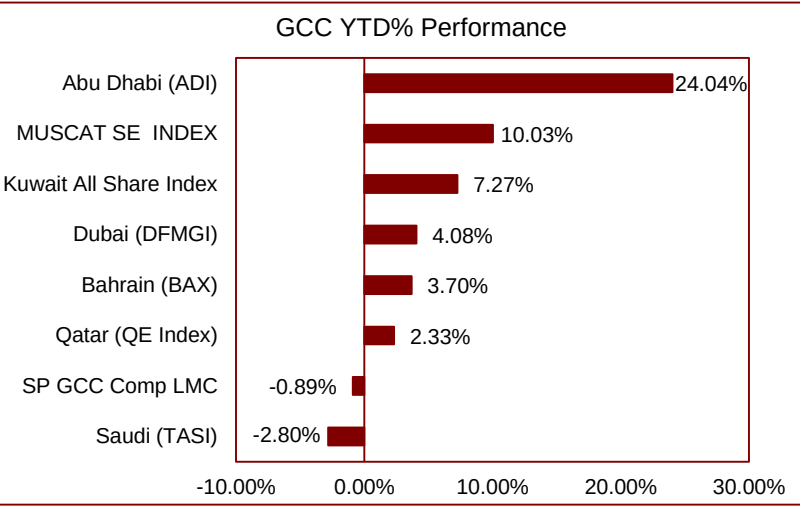
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.115	-0.27	-0.18	3.43	14.24	17.43	8.41 KWD	2.14	27.00
KFH	0.862	-0.12	0.00	6.42	2.50	13.97	11.46 KWD	3.56	32.00
Zain	0.596	0.85	-3.40	-0.50	1.88	0.17	2.58 KWD	2.14	12.75
BOUBYAN BANK	0.840	-0.59	-0.36	1.94	9.80	17.92	3.14 KWD	3.33	34.00
Agility	0.765	-1.03	-2.80	-2.42	14.52	-2.86	2.05 KWD	1.41	50.00
Saudi Arabia									
ARAMCO	33.40	0.91	-0.89	-4.30	-6.83	2.63	7,348.00 SAR	5.29	12.76
SABIC	82.90	1.09	-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	16.19
AL-RAJHI BANK	82.90	-0.36	-1.89	-2.70	1.97	-6.46	331.60 SAR	3.85	21.80
NCB	52.80	0.38	-3.12	-11.11	-16.32	-18.01	236.44 SAR	1.44	12.73
United Arab Emirates									
ETISALAT.AD	25.18	0.72	-0.55	-2.40	7.79	-20.57	217.41 AED	4.57	23.34
FAB.AD	18.00	2.97	4.05	0.56	0.78	-3.34	198.86 AED	1.77	14.30
EMIRATES NBD	13.25	0.38	0.76	0.00	3.11	-2.21	83.69 AED	0.95	7.91
DB ISLAMIC BK	5.73	-0.35	-0.87	-1.55	-4.18	6.51	41.49 AED	1.02	8.36
EMAAR PROPERT	6.06	-0.98	-1.46	0.00	4.66	23.93	49.57 AED	0.76	6.98
Qatar									
QNB	19.00	0.26	-0.73	-4.71	-4.52	-5.89	175.70 QAR	1.67	13.61
INDUSTRIES QAT	14.70	0.82	-3.98	-6.79	-13.02	-5.10	89.04 QAR	2.20	9.36
QA ISLAMIC BK	23.39	-0.55	-4.53	-4.10	-5.30	27.61	55.34 QAR	2.10	15.00
MASRAF AL RAYA	3.65	2.56	-1.64	-4.90	-11.43	-21.36	33.98 QAR	1.40	22.83
MESAIEED PETRO	2.21	-0.49	-1.60	-2.47	-5.79	5.93	27.85 QAR	1.62	14.68
OMAN									
BANK MUSCAT	0.278	1.09	-1.42	-2.80	-3.14	20.62	2.09 OMR	0.96	8.33
OMANTEL	0.844	-4.95	-1.40	0.48	-4.09	12.23	0.63 OMR	1.07	7.69
BANK DHOFAR	0.152	1.33	4.11	4.83	7.04	20.63	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.286	1.06	5.93	10.00	5.93	45.18	0.47 QAR	0.80	12.71
OMINVEST	0.370	1.65	3.93	12.12	11.45	20.92	0.25 QAR	0.74	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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Leading Sector, Security Performance

Kuwait

The market is down today by -0.22 %The leading sector bottom performance indices today are Technology -9.69 % Insurance -1.5 % Financial services -1.39 % respectively

KSA

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

U.A.E

ETISALAT .AD has a positive performance today by + 0.72 %, FAB.AD has a positive performance today by + 2.97 %



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