



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

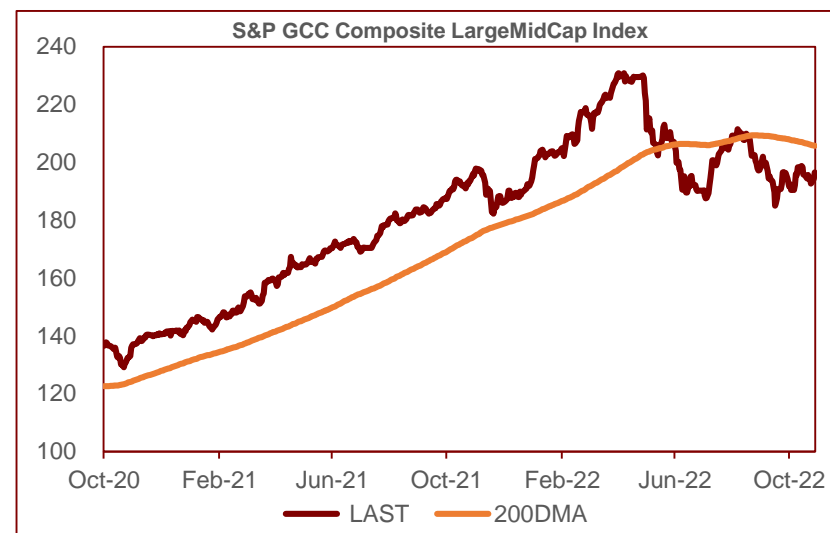
Thursday, November 24<sup>th</sup> 2022





Market Watch Thursday, November 24, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	10,938.75	-0.24	-1.82	-6.25	-4.09	-3.04	10,155 SAR	1.70	16.14
Qatar (QE Index)	11,867.24	-0.25	-2.83	-4.41	-6.52	2.08	602 QAR	1.35	13.84
Dubai (DFMGI)	3,305.27	-0.03	-0.25	-0.19	-0.41	4.05	444 AED	1.23	13.01
Abu Dhabi (ADI)	10,528.49	0.06	1.05	1.18	8.04	24.11	1,435 AED	2.05	19.71
Bahrain (BAX)	1,862.86	-0.05	-0.11	-0.10	-1.02	3.65	19 BHD	1.77	15.31
MUSCAT SE INDEX	4,555.21	0.25	1.54	4.33	0.59	10.31	5 OMR	0.92	13.25
SP GCC Comp LMC	188.00	0.05	-1.12	-3.85	-1.33	-0.84			
SP UAE PRICE INDEX	143.30	0.21	0.78	0.43	3.76	-2.39			
<b>Developed Markets</b>									
MSCI World Index	2,703.67	0.32	2.41	6.21	13.76	-16.27			
U.S. (S&P 500)	4,026.12	0.00	2.04	4.01	12.32	-15.50			
U.K. (FTSE 100)	7,486.67	0.02	1.63	5.24	8.31	1.11			
Japan (Topix)	2,018.00	1.21	2.67	4.63	9.96	1.33			
<b>Emerging Markets</b>									
MSCI EM Index	941.01	1.42	0.34	11.48	7.97	-23.25			
China (SSE Composite)	3,101.69	-0.25	-0.84	6.77	2.15	-15.12			
India (Sensex)	62,293.64	1.24	0.85	2.51	8.44	6.90			
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,586.59	0.41	-0.31	3.66	6.77	7.72	48.92 KWD	2.36	29.58
Kuwait Premier Index	8,486.24	0.32	-0.43	3.61	6.75	11.09	38.71 KWD	2.54	26.27
Kuwait Main Index	5,704.58	0.80	0.18	3.92	6.86	-3.09	10.21 KWD	1.66	42.20
NIC 50	9,510.11	0.00	-0.44	3.60	6.74	11.59	28.60 KWD	2.52	25.27
<b>Kuwait Sector</b>									
Banking	1,865.67	0.42	0.26	4.12	7.02	14.97	31.31 KWD	1.43	27.27
Telecom	1,224.41	0.58	-2.65	1.03	5.25	12.40	3.76 KWD	2.13	12.69
Industrials	1,119.93	0.71	-0.54	1.32	10.17	-1.89	3.95 KWD	0.84	18.65
Financial services	1,342.46	0.22	-2.76	5.23	7.08	-5.68	3.75 KWD	0.70	18.12
Real estate	1,275.84	0.38	-0.36	3.79	6.13	-3.81	2.75 KWD	0.59	21.87
Basic materials	884.64	0.24	0.83	3.30	-1.86	-13.68	0.78 KWD	1.26	8.58
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	476.29	1.09	3.43	4.68	1.92	-34.85	0.76 KWD	0.97	11.71
Insurance	1,556.11	-0.29	0.25	2.01	3.66	1.48	0.64 KWD	0.83	9.24
Consumer Disc	1,483.51	0.30	0.54	6.21	7.10	10.99	0.15 KWD	0.99	0.00
Energy	1,102.03	-0.25	0.39	7.96	3.23	-22.84	0.23 KWD	0.80	4.86
Technology	676.57	5.08	8.27	10.98	14.81	-1.06	0.01 KWD	0.83	0.00
Utilities	513.16	-0.51	-0.51	1.04	0.00	-14.47	0.21 KWD	1.81	16.04



### What Move the GCC markets

#### Oil Prices

Oil prices fell on Thursday, extending losses from the previous session, as fears of supply disruption eased on news that the Group of Seven (G7) nations were considering a high price cap on Russian oil. Brent crude futures had slid 43 cents, or 0.5%, to \$84.98 a barrel.

#### Kuwait Market

The market closed up today by + 0.41% at 7,586.59 value traded 33.6 million KD, Premier market value traded reached 25.5 million KD and closed at 8,486.24 up by + 0.32%.

#### KSA Market

The market closed down today by - 0.24% at 10,938.75.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



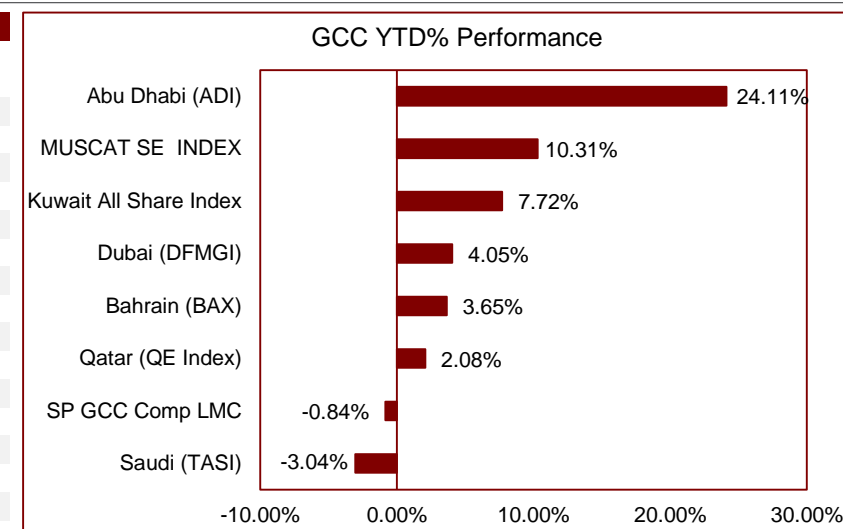
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.120	0.45	0.27	3.90	14.75	17.95	8.45 KWD	2.15	27.00
KFH	0.864	0.23	0.23	6.67	2.73	14.23	11.49 KWD	3.56	32.00
Zain	0.593	-0.50	-3.89	-1.00	1.37	-0.34	2.57 KWD	2.13	12.69
BOUBYAN BANK	0.844	0.48	0.12	2.43	10.33	18.48	3.15 KWD	3.35	34.00
Agility	0.775	1.31	-1.52	-1.15	16.02	-1.59	2.07 KWD	1.43	50.65
<b>Saudi Arabia</b>									
ARAMCO	33.20	-0.60	-1.48	-4.87	-7.39	2.01	7,302.25 SAR	5.26	12.76
SABIC	84.40	1.81	-0.59	-4.52	-4.95	-27.24	253.14 SAR	1.38	35.00
STC	39.10	0.26	3.85	-3.22	-0.64	-13.03	195.45 SAR	2.66	16.19
AL-RAJHI BANK	82.80	-0.12	-2.01	-2.82	1.85	-6.57	331.12 SAR	3.85	21.80
NCB	53.00	0.38	-2.75	-10.77	-16.01	-17.70	237.28 SAR	1.45	12.73
<b>United Arab Emirates</b>									
ETISALAT.AD	25.24	0.24	-0.32	-2.17	8.05	-20.38	219.50 AED	23.56	4.61
FAB.AD	18.14	0.78	4.86	1.34	1.57	-2.59	199.96 AED	1.78	14.41
EMIRATES NBD	13.25	0.00	0.76	0.00	3.11	-2.21	83.38 AED	0.94	7.91
DB ISLAMIC BK	5.75	0.35	-0.52	-1.20	-3.85	6.88	41.63 AED	1.03	8.39
EMAAR PROPERT	6.04	-0.33	-1.79	-0.33	4.32	23.52	48.26 AED	0.74	6.96
<b>Qatar</b>									
QNB	19.15	0.79	0.05	-3.96	-3.77	-5.15	176.88 QAR	1.69	13.71
INDUSTRIES QAT	14.66	-0.27	-4.25	-7.04	-13.25	-5.36	88.78 QAR	2.19	9.34
QA ISLAMIC BK	23.14	-1.07	-5.55	-5.13	-6.32	26.24	54.68 QAR	2.08	14.84
MASRAF AL RAYA	3.59	-1.53	-3.15	-6.36	-12.79	-22.56	33.45 QAR	1.38	22.48
MESAIIEED PETRO	2.22	0.27	-1.33	-2.20	-5.53	6.22	27.92 QAR	1.63	14.72
<b>OMAN</b>									
BANK MUSCAT	0.277	-0.36	-1.77	-3.15	-3.48	20.19	2.08 OMR	0.96	8.33
OMANTEL	0.848	-4.50	-0.93	0.95	-3.64	12.77	0.64 OMR	1.08	7.69
BANK DHOFAR	0.152	0.00	4.11	4.83	7.04	20.63	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.290	1.40	7.41	11.54	7.41	47.21	0.47 QAR	0.81	12.71
OMINVEST	0.372	0.54	4.49	12.73	12.05	21.57	0.25 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Nov 22	24.56%	17.23%	0.06%	1.20%	0.36%	4.51%	17.74%	11.76%	5.87%	5.18%
23-Nov 22	24.57%	17.29%	0.06%	1.21%	0.36%	4.51%	17.73%	11.82%	5.90%	5.19%

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector, Security Performance

#### Kuwait

The market is up today by + 0.41 % The leading sector best performance indices today are Technology 5.08 % Consumer services 1.09 % Industrials 0.71 % respectively

#### KSA

Saudi Armco has a negative performance today by -0.6 %, SABIC has a positive performance today by + 1.81%, STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a negative performance today by -0.12 %

#### U.A.E

ETISALAT .AD has a positive performance today by + 0.24 %, FAB.AD has a positive performance today by + 0.78 %



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