



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, November 28th 2022

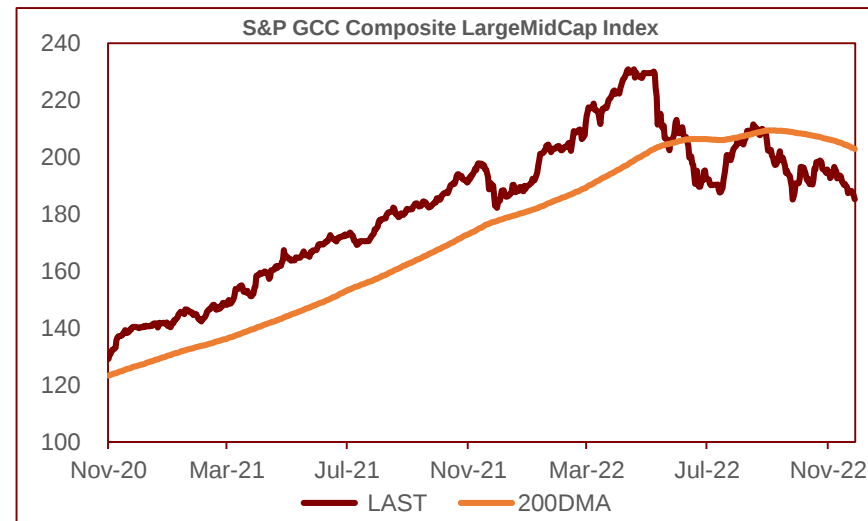




Market Watch

Monday, November 28, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,746.64	-0.46	-1.76	-7.89	-5.78	-4.74	9,889 SAR	1.65	15.37
Qatar (QE Index)	11,629.55	-0.91	-2.00	-6.32	-8.39	0.03	587 QAR	1.32	13.75
Dubai (DFMGI)	3,287.34	-0.54	-1.14	-1.33	-1.55	2.86	440 AED	1.22	12.91
Abu Dhabi (ADI)	10,406.34	-1.16	-1.22	-0.06	6.72	22.60	1,435 AED	2.04	19.71
Bahrain (BAX)	1,865.75	0.00	0.16	0.06	-0.86	3.81	19 BHD	1.77	15.32
MUSCAT SE INDEX	4,612.64	0.12	1.26	5.65	1.86	11.70	5 OMR	0.94	13.25
SP GCC Comp LMC	185.18	-0.68	-1.59	-5.37	-2.89	-2.41			
SP UAE PRICE INDEX	141.21	-1.46	-1.89	-1.47	1.79	-4.24			
Developed Markets									
MSCI World Index	2,668.44	-1.30	-1.39	4.74	12.18	-17.43			
U.S. (S&P 500)	3,963.94	-1.54	-1.57	2.38	10.55	-16.83			
U.K. (FTSE 100)	7,474.02	-0.17	0.10	5.35	8.42	1.21			
Japan (Topix)	2,004.31	-0.68	-0.72	3.88	9.17	0.60			
Emerging Markets									
MSCI EM Index	930.77	-1.09	-1.57	9.74	6.28	-24.45			
China (SSE Composite)	3,078.55	-0.75	-0.35	6.40	1.79	-15.42			
India (Sensex)	62,504.80	0.34	0.37	2.89	8.84	7.30			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,536.27	-0.77	-0.66	2.98	6.06	7.00	48.79 KWD	2.34	29.27
Kuwait Premier Index	8,431.98	-0.74	-0.64	2.94	6.06	10.38	38.62 KWD	2.52	26.16
Kuwait Main Index	5,661.12	-0.86	-0.76	3.12	6.05	-3.83	10.16 KWD	1.65	41.15
NIC 50	9,460.07	-0.79	-0.65	2.93	6.05	11.00	28.60 KWD	2.50	25.16
Kuwait Sector									
Banking	1,852.04	-0.76	-0.73	3.36	6.24	14.13	31.23 KWD	1.39	27.16
Telecom	1,209.34	-0.97	-1.23	-0.22	3.95	11.01	3.71 KWD	2.10	12.52
Industrials	1,124.78	-0.50	0.43	1.76	10.64	-1.46	3.97 KWD	0.85	18.58
Financial services	1,331.97	-0.97	-0.78	4.41	6.24	-6.42	3.74 KWD	0.70	18.15
Real estate	1,269.41	-0.60	-0.50	3.26	5.60	-4.30	2.74 KWD	0.59	22.17
Basic materials	881.05	-0.07	-0.41	2.88	-2.26	-14.03	0.78 KWD	1.28	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	475.27	-0.43	-0.21	4.45	1.70	-34.99	0.76 KWD	0.96	11.57
Insurance	1,558.47	-0.47	0.15	2.16	3.82	1.64	0.65 KWD	0.84	9.24
Consumer Disc	1,462.33	-1.55	-1.43	4.70	5.57	9.40	0.15 KWD	0.99	0.00
Energy	1,087.48	-1.52	-1.32	6.54	1.87	-23.85	0.23 KWD	0.80	4.74
Technology	662.02	-4.11	-2.15	8.59	12.35	-3.19	0.01 KWD	0.81	0.00
Utilities	513.16	-0.51	0.00	1.04	0.00	-14.47	0.21 KWD	1.81	16.04



What Move the GCC markets

Oil Prices

Oil prices fell to near their lowest levels this year on Monday as street protests against strict Covid-19 curbs in China, the world's biggest crude importer, stoked concern about the outlook for fuel demand. Brent crude dropped \$2.86, or 3.4%, to trade at \$80.77 a barrel

Kuwait Market

The market closed down today by - 0.77% at 7,536.27 value traded 46.8 million KD, Premier market value traded reached 36.5 million KD and closed at 8,431.98 down by - 0.74%.

KSA Market

The market closed down today by – 0.46% at 10,746.64.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



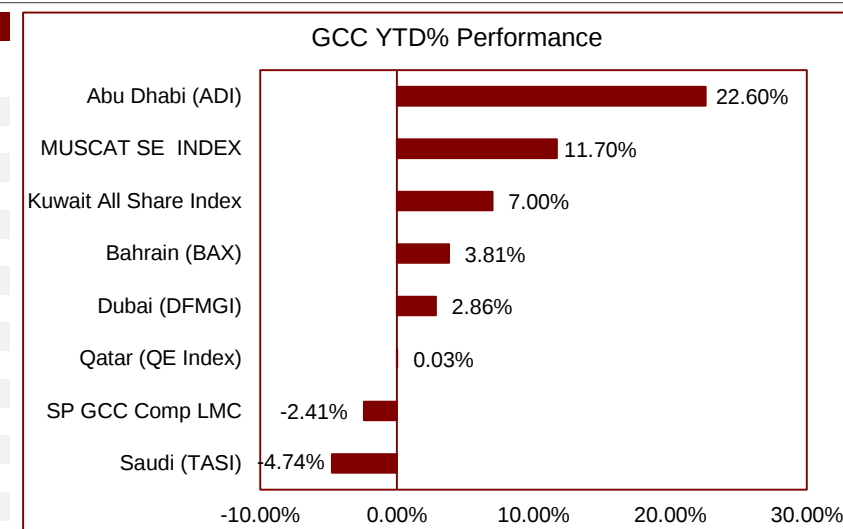
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.109	-0.81	-0.98	2.88	13.63	16.80	8.38 KWD	2.13	27.00
KFH	0.859	-0.92	-0.58	6.05	2.14	13.57	11.54 KWD	3.54	32.00
Zain	0.585	-1.18	-1.35	-2.34	0.00	-1.68	2.53 KWD	2.10	12.52
BOUBYAN BANK	0.838	-0.48	-0.71	1.70	9.54	17.64	3.14 KWD	3.32	34.00
Agility	0.778	-0.38	0.39	-0.77	16.47	-1.21	2.08 KWD	1.44	50.85
Saudi Arabia									
ARAMCO	32.20	-2.57	-3.01	-7.74	-10.18	-1.06	7,083.06 SAR	5.10	12.63
SABIC	82.50	-2.25	-2.25	-6.67	-7.09	-28.88	247.47 SAR	1.35	35.00
STC	38.00	-2.69	-2.81	-5.94	-3.43	-15.48	189.97 SAR	2.59	16.21
AL-RAJHI BANK	81.80	0.00	-1.21	-3.99	0.62	-7.70	327.16 SAR	3.80	21.51
NCB	52.20	-0.76	-1.51	-12.12	-17.27	-18.94	233.72 SAR	1.43	12.68
United Arab Emirates									
ETISALAT.AD	24.42	-2.32	-3.25	-5.35	4.54	-22.97	217.41 AED	4.57	23.34
FAB.AD	17.40	-3.87	-4.08	-2.79	-2.58	-6.56	192.23 AED	1.71	13.82
EMIRATES NBD	13.00	-1.52	-1.89	-1.89	1.17	-4.06	82.12 AED	0.93	7.76
DB ISLAMIC BK	5.72	-0.52	-0.52	-1.72	-4.35	6.32	41.42 AED	1.02	8.35
EMAAR PROPERT	5.95	0.85	-1.49	-1.82	2.76	21.68	48.67 AED	0.75	6.85
Qatar									
QNB	18.92	-0.42	-1.20	-5.12	-4.92	-6.29	173.89 QAR	1.67	13.55
INDUSTRIES QAT	14.53	-0.41	-0.89	-7.86	-14.02	-6.20	87.47 QAR	2.17	9.26
QA ISLAMIC BK	22.80	0.40	-1.47	-6.52	-7.69	24.39	53.61 QAR	2.05	14.62
MASRAF AL RAYA	3.51	-1.54	-2.42	-8.63	-14.90	-24.44	32.45 QAR	1.35	21.94
MESAIEED PETRO	2.19	0.18	-1.58	-3.74	-7.02	4.55	27.32 QAR	1.60	14.49
OMAN									
BANK MUSCAT	0.280	0.00	1.08	-2.10	-2.44	21.49	2.11 OMR	0.97	8.33
OMANTEL	0.852	-4.05	0.47	1.43	-3.18	13.30	0.64 OMR	1.08	7.69
BANK DHOFAR	0.155	1.31	1.97	6.90	9.15	23.02	0.47 QAR	0.66	14.93
NAT BANK OF OMAN	0.290	0.00	0.00	11.54	7.41	47.21	0.47 QAR	0.81	12.71
OMINVEST	0.392	2.62	5.38	18.79	18.07	28.10	0.26 QAR	0.78	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 down today by -0.77 %The leading sector bottom performance indices today are Technology -4.11 % Consumer Disc -1.55 % Energy -1.52 % respectively

KSA

Saudi Armco has a negative performance today by -2.57 %, SABIC has a negative performance today by -2.25 %, STC has a negative performance today by -2.69 %, Al Rajhi Bank flat performance today.

U.A.E

ETISALAT .AD has a negative performance today by -2.32 %, FAB.AD has a negative performance today by -3.87 %



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Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw