

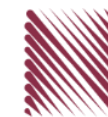


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, November 29th 2022

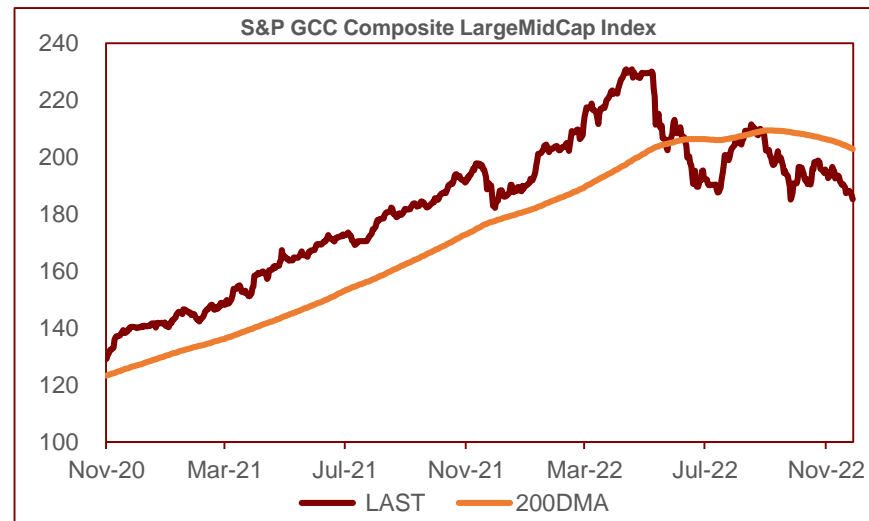




Market Watch Tuesday, November 29, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,752.01	0.05	-1.71	-7.85	-5.73	-4.70	10,109 SAR	1.64	15.49
Qatar (QE Index)	11,799.90	1.46	-0.57	-4.95	-7.05	1.50	600 QAR	1.33	13.84
Dubai (DFMGI)	3,304.39	0.52	-0.63	-0.82	-1.04	3.39	441 AED	1.23	12.93
Abu Dhabi (ADI)	10,392.30	-0.13	-1.35	-0.19	6.58	22.43	1,435 AED	2.04	19.69
Bahrain (BAX)	1,865.10	-0.04	0.12	0.02	-0.90	3.77	19 BHD	1.77	15.30
MUSCAT SE INDEX	4,613.72	0.02	1.28	5.67	1.89	11.72	5 OMR	0.94	13.25
SP GCC Comp LMC	185.12	-0.04	-1.62	-5.41	-2.93	-2.45			
SP UAE PRICE INDEX	140.90	-0.22	-2.11	-1.68	1.57	-4.45			
Developed Markets									
MSCI World Index	2,663.25	-0.19	-1.58	4.53	11.96	-17.59			
U.S. (S&P 500)	3,957.63	-0.16	-1.73	2.21	10.38	-16.96			
U.K. (FTSE 100)	7,512.00	0.51	0.61	5.88	8.97	1.73			
Japan (Topix)	1,992.97	-0.57	-1.28	3.29	8.55	0.03			
Emerging Markets									
MSCI EM Index	952.94	2.38	0.78	12.35	8.81	-22.65			
China (SSE Composite)	3,149.75	2.31	1.96	8.86	4.14	-13.46			
India (Sensex)	62,681.84	0.28	0.66	3.19	9.15	7.60			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,533.81	-0.03	-0.70	2.94	6.02	6.97	48.81 KWD	2.50	29.14
Kuwait Premier Index	8,427.37	-0.05	-0.69	2.89	6.01	10.32	38.58 KWD	2.52	26.05
Kuwait Main Index	5,664.40	0.06	-0.70	3.18	6.11	-3.77	10.23 KWD	2.37	40.87
NIC 50	9,457.80	-0.02	-0.70	2.88	6.00	10.97	28.60 KWD	2.50	25.05
Kuwait Sector									
Banking	1,852.18	0.01	-0.72	3.36	6.25	14.14	31.21 KWD	1.39	27.05
Telecom	1,215.68	0.52	-0.71	0.31	4.49	11.59	3.73 KWD	2.12	12.60
Industrials	1,117.67	-0.63	-0.20	1.12	9.94	-2.09	3.95 KWD	0.84	18.56
Financial services	1,328.38	-0.27	-1.05	4.13	5.95	-6.67	3.73 KWD	0.68	17.89
Real estate	1,265.75	-0.29	-0.79	2.96	5.29	-4.57	2.73 KWD	0.59	22.32
Basic materials	882.49	0.16	-0.24	3.05	-2.10	-13.88	0.78 KWD	1.28	8.56
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.29 KWD	2.64	11.08
Consumer services	472.18	-0.65	-0.86	3.77	1.04	-35.42	0.76 KWD	0.95	11.61
Insurance	1,554.28	-0.27	-0.12	1.89	3.54	1.36	0.64 KWD	0.83	9.24
Consumer Disc	1,465.40	0.21	-1.22	4.92	5.79	9.63	0.14 KWD	0.99	0.00
Energy	1,099.82	1.13	-0.20	7.75	3.02	-22.99	0.23 KWD	0.81	4.82
Technology	724.59	9.45	7.10	18.86	22.96	5.96	0.01 KWD	0.89	0.00
Utilities	518.42	1.03	1.03	2.07	1.03	-13.60	0.22 KWD	1.82	16.20



What Move the GCC markets

Oil Prices

Oil jumped on Tuesday, buoyed by hopes that China would relax its Covid-19 controls after rare protests against the country's zero-Covid strategy over the weekend in big Chinese cities. Brent crude futures advanced \$1.4, or 1.7%, and traded at \$84.57 a barrel

Kuwait Market

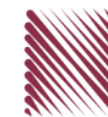
The market closed down today by - 0.03% at 7,533.81 value traded 30.8 million KD, Premier market value traded reached 22.3 million KD and closed at 8,427.37 down by - 0.05%.

KSA Market

The market closed up today by + 0.05% at 10,746.64.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



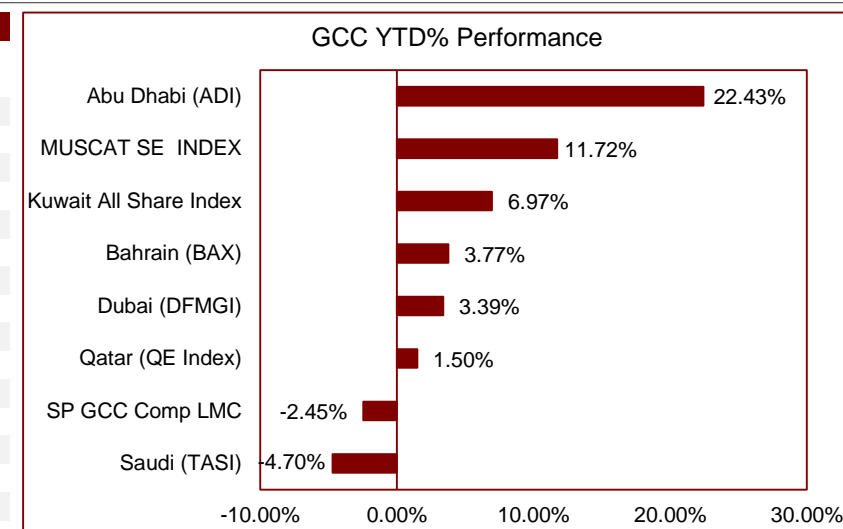
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	1.110	0.09	-0.89	2.97	13.73	16.90	8.39 KWD	2.13	27.00
KFH	0.862	0.35	-0.23	6.42	2.50	13.97	11.57 KWD	3.56	32.00
Zain	0.589	0.68	-0.67	-1.67	0.68	-1.01	2.55 KWD	2.12	12.60
BOUBYAN BANK	0.828	-1.19	-1.90	0.49	8.24	16.23	3.10 KWD	3.28	34.00
Agility	0.767	-1.41	-1.03	-2.17	14.82	-2.60	2.05 KWD	1.42	50.13
Saudi Arabia									
ARAMCO	33.20	3.11	0.00	-4.87	-7.39	2.01	7,305.94 SAR	5.26	12.31
SABIC	83.40	1.09	-1.18	-5.66	-6.08	-28.10	250.27 SAR	1.37	35.00
STC	38.00	0.00	-2.81	-5.94	-3.43	-15.48	190.05 SAR	2.59	15.78
AL-RAJHI BANK	80.30	-1.83	-3.02	-5.75	-1.23	-9.39	321.29 SAR	3.73	21.51
NCB	51.20	-1.92	-3.40	-13.80	-18.86	-20.50	229.33 SAR	1.40	12.59
United Arab Emirates									
ETISALAT.AD	24.50	0.33	-2.93	-5.04	4.88	-22.71	212.37 AED	4.46	22.79
FAB.AD	17.30	-0.57	-4.63	-3.35	-3.14	-7.10	191.12 AED	1.70	13.75
EMIRATES NBD	12.90	-0.77	-2.64	-2.64	0.39	-4.80	81.48 AED	0.92	7.70
DB ISLAMIC BK	5.75	0.52	0.00	-1.20	-3.85	6.88	41.63 AED	1.03	8.39
EMAAR PROPERT	5.95	0.00	-1.49	-1.82	2.76	21.68	48.67 AED	0.75	6.85
Qatar									
QNB	19.30	2.01	0.78	-3.21	-3.02	-4.41	178.26 QAR	1.70	13.82
INDUSTRIES QAT	14.77	1.65	0.75	-6.34	-12.60	-4.65	89.36 QAR	2.21	9.41
QA ISLAMIC BK	23.30	2.19	0.69	-4.47	-5.67	27.11	55.06 QAR	2.09	14.94
MASRAF AL RAYA	3.53	0.68	-1.75	-8.00	-14.32	-23.92	32.83 QAR	1.36	22.09
MESAIEED PETRO	2.28	4.35	2.70	0.44	-2.98	9.09	28.64 QAR	1.67	15.12
OMAN									
BANK MUSCAT	0.280	0.00	1.08	-2.10	-2.44	21.49	2.10 OMR	0.97	8.33
OMANTEL	0.872	-1.80	2.83	3.81	-0.91	15.96	0.65 OMR	1.11	7.69
BANK DHOFAR	0.155	0.00	1.97	6.90	9.15	23.02	0.46 QAR	0.66	14.93
NAT BANK OF OMAN	0.288	-0.69	-0.69	10.77	6.67	46.19	0.47 QAR	0.81	12.71
OMINVEST	0.392	0.00	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 -0.03 % The leading sector bottom performance indices today are Consumer services -0.65 % Industrials -0.63 % Real estate -0.29 % respectively

KSA

Saudi Armco has a positive performance today by + 3.11 %, SABIC has a positive performance today by + 1.09 %, STC flat performance today 0 %, Al Rajhi Bank has a negative performance today by -1.83 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.33 %, FAB.AD has a negative performance today by -0.57 %



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