

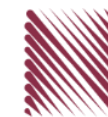


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, November 30<sup>th</sup> 2022

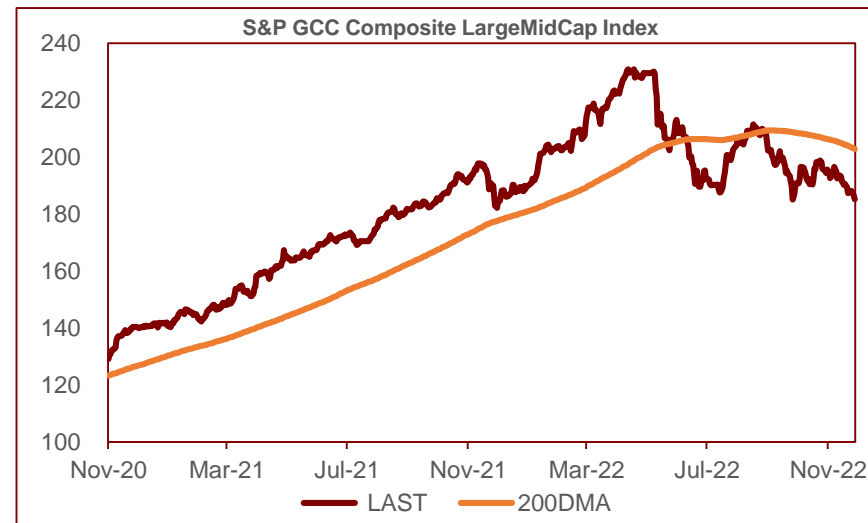




### Market Watch

Wednesday, November 30, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	10,896.91	1.35	-0.38	-6.61	-4.46	-3.41	10,221 SAR	1.66	15.50
Qatar (QE Index)	11,925.98	1.07	0.49	-3.93	-6.06	2.58	607 QAR	1.33	13.95
Dubai (DFMGI)	3,323.96	0.59	-0.04	-0.23	-0.45	4.01	443 AED	1.23	12.93
Abu Dhabi (ADI)	10,552.37	1.54	0.17	1.35	8.22	24.32	1,435 AED	2.06	19.69
Bahrain (BAX)	1,864.91	-0.01	0.11	0.01	-0.91	3.76	19 BHD	1.77	15.30
MUSCAT SE INDEX	4,613.72	0.00	1.28	5.67	1.89	11.72	5 OMR	0.94	13.25
SP GCC Comp LMC	188.03	1.57	-0.07	-3.92	-1.40	-0.91			
SP UAE PRICE INDEX	144.71	2.70	0.54	0.98	4.32	-1.87			
<b>Developed Markets</b>									
MSCI World Index	2,720.89	2.16	0.55	6.80	14.39	-15.81			
U.S. (S&P 500)	4,080.11	3.09	1.31	5.38	13.79	-14.39			
U.K. (FTSE 100)	7,573.05	0.81	1.43	6.74	9.85	2.55			
Japan (Topix)	1,985.57	-0.37	-1.65	2.91	8.15	-0.34			
<b>Emerging Markets</b>									
MSCI EM Index	972.29	2.03	2.83	14.63	11.02	-21.08			
China (SSE Composite)	3,151.34	0.05	2.01	8.91	4.20	-13.42			
India (Sensex)	63,099.65	0.67	1.33	3.87	9.88	8.32			
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,584.59	0.67	-0.03	3.64	6.74	7.69	49.02 KWD	2.36	29.74
Kuwait Premier Index	8,491.90	0.77	0.07	3.67	6.82	11.16	38.83 KWD	2.54	26.35
Kuwait Main Index	5,681.30	0.30	-0.41	3.49	6.42	-3.48	10.19 KWD	1.66	42.74
NIC 50	9,535.84	0.83	0.06	3.66	6.81	11.89	28.60 KWD	2.52	25.35
<b>Kuwait Sector</b>									
Banking	1,864.78	0.68	-0.05	4.07	6.97	14.91	31.39 KWD	1.37	27.35
Telecom	1,214.16	-0.13	-0.84	0.18	4.36	11.46	3.72 KWD	2.11	12.56
Industrials	1,136.21	1.66	1.45	2.80	11.77	-0.46	4.01 KWD	0.85	19.53
Financial services	1,332.79	0.33	-0.72	4.47	6.31	-6.36	3.74 KWD	0.71	16.01
Real estate	1,281.59	1.25	0.45	4.25	6.61	-3.38	2.76 KWD	0.60	22.28
Basic materials	881.68	-0.09	-0.33	2.95	-2.19	-13.96	0.78 KWD	1.28	8.55
Health care	454.28	0.00	0.00	-5.75	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	488.63	3.48	2.59	7.39	4.56	-33.17	0.76 KWD	0.96	11.63
Insurance	1,543.83	-0.67	-0.79	1.20	2.84	0.68	0.64 KWD	0.81	9.24
Consumer Disc	1,479.08	0.93	-0.30	5.90	6.78	10.66	0.15 KWD	1.01	0.00
Energy	1,091.46	-0.76	-0.96	6.93	2.24	-23.58	0.23 KWD	0.80	4.78
Technology	771.15	6.43	13.98	26.49	30.87	12.77	0.01 KWD	0.94	0.00
Utilities	518.42	0.00	1.03	2.07	1.03	-13.60	0.22 KWD	1.82	16.20



### What Move the GCC markets

#### Oil Prices

Oil prices rose by over 2% on Wednesday on signs of tighter supply, a weaker dollar and optimism over a Chinese demand recovery. But the likelihood that OPEC+ will leave output unchanged at its upcoming meeting limited the gains. Brent crude futures rose \$2.23, or 2.7% to \$85.26 per barrel.

#### Kuwait Market

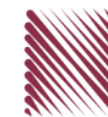
The market closed up today by + 0.67% at 7,584.59 value traded 99.4 million KD, Premier market value traded reached 83.3 million KD and closed at 8,491.90 up by + 0.77%.

#### KSA Market

The market closed up today by + 1.35% at 10,896.91.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



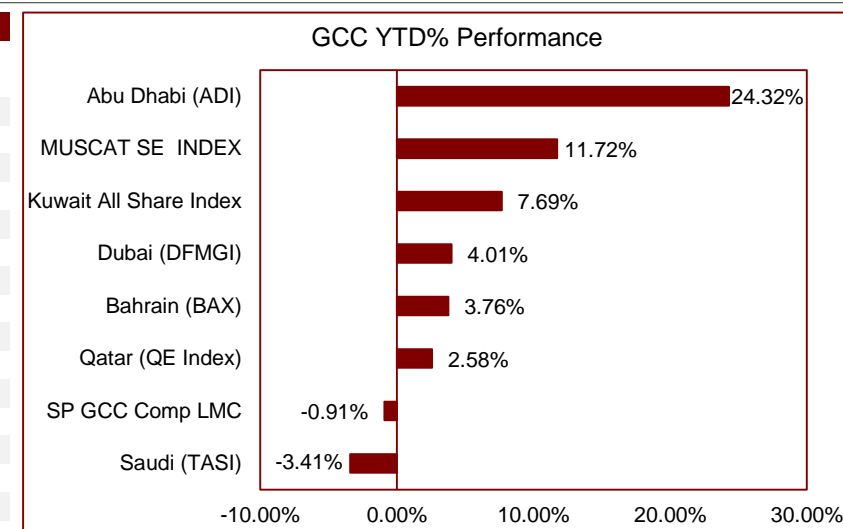
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.122	1.08	0.18	4.08	14.96	18.16	8.47 KWD	2.16	27.00
KFH	0.866	0.46	0.23	6.91	2.97	14.50	11.61 KWD	3.57	32.00
Zain	0.587	-0.34	-1.01	-2.00	0.34	-1.34	2.54 KWD	2.11	12.56
BOUBYAN BANK	0.844	1.93	0.00	2.43	10.33	18.48	3.15 KWD	3.35	34.00
Agility	0.787	2.61	1.55	0.38	17.81	-0.06	2.10 KWD	1.46	51.44
<b>Saudi Arabia</b>									
ARAMCO	33.50	0.90	0.90	-4.01	-6.56	2.93	7,371.96 SAR	5.31	12.69
SABIC	83.00	-0.48	-1.66	-6.11	-6.53	-28.45	249.07 SAR	1.36	35.00
STC	38.45	1.18	-1.66	-4.83	-2.29	-14.48	192.30 SAR	2.62	15.78
AL-RAJHI BANK	80.50	0.25	-2.78	-5.52	-0.98	-9.17	322.09 SAR	3.74	21.12
NCB	51.40	0.39	-3.02	-13.47	-18.54	-20.19	230.23 SAR	1.40	12.35
<b>United Arab Emirates</b>									
ETISALAT.AD	25.80	5.31	2.22	0.00	10.45	-18.61	213.0 AED	4.48	22.87
FAB.AD	17.60	1.73	-2.98	-1.68	-1.46	-5.49	194.44 AED	1.73	13.75
EMIRATES NBD	13.25	2.71	0.00	0.00	3.11	-2.21	83.69 AED	0.95	7.70
DB ISLAMIC BK	5.68	-1.22	-1.22	-2.41	-5.02	5.58	41.13 AED	1.01	8.39
EMAAR PROPERT	6.08	2.18	0.66	0.33	5.01	24.34	49.73 AED	0.76	6.85
<b>Qatar</b>									
QNB	19.60	1.55	2.35	-1.71	-1.51	-2.92	181.03 QAR	1.73	14.04
INDUSTRIES QAT	14.89	0.81	1.57	-5.58	-11.89	-3.87	90.08 QAR	2.22	9.49
QA ISLAMIC BK	24.28	4.21	4.93	-0.45	-1.70	32.46	57.37 QAR	2.18	15.57
MASRAF AL RAYA	3.54	0.23	-1.53	-7.79	-14.13	-23.75	32.90 QAR	1.36	22.14
MESAIIEED PETRO	2.33	2.19	4.95	2.64	-0.85	11.48	29.27 QAR	1.71	15.45
<b>OMAN</b>									
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	0.00	-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
23-Nov 22	24.57%	17.29%	0.06%	1.21%	0.36%	4.51%	17.73%	11.82%	5.90%	5.19%
30-Nov 22	24.59%	17.27%	0.06%	1.21%	0.36%	4.55%	17.72%	11.86%	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 + 0.67 % The leading sector best performance indices today are Technology 6.43 % Consumer services 3.48 % Industrials 1.66 % respectively

#### KSA

Saudi Armco has a positive performance today by + 0.9 %, SABIC have negative performance today by -0.47 % STC has a positive performance today by + 1.18 %, Al Rajhi Bank has a positive performance today by + 0.25 %

#### U.A.E

ETISALAT .AD has a positive performance today by + 5.31 %, FAB.AD has a positive performance today by + 1.73 %



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