



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, December 7<sup>th</sup> 2022

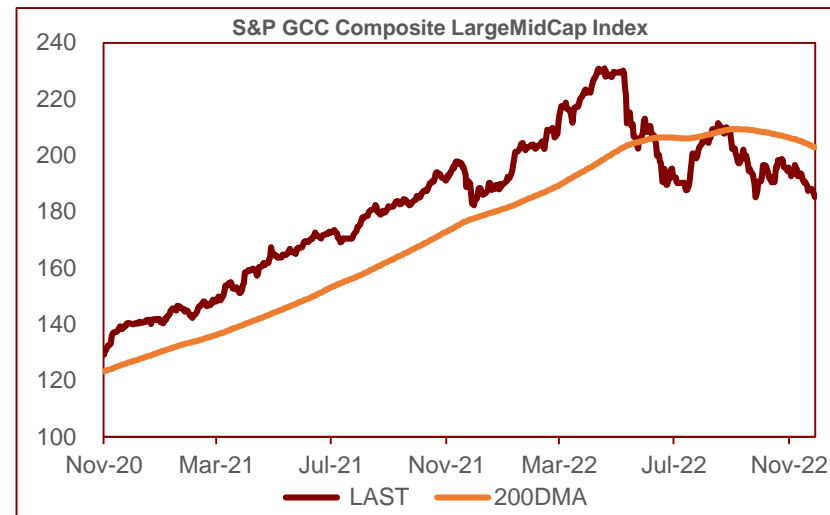




### Market Watch

Wednesday, December 7, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	10,185.14	-2.48	-5.89	-6.53	-10.70	-9.72	9,654 SAR	1.62	15.24
Qatar (QE Index)	11,463.07	-1.33	-4.61	-3.88	-9.71	-1.40	583 QAR	1.33	13.18
Dubai (DFMGI)	3,338.88	-0.03	0.45	0.45	-0.01	4.47	445 AED	1.23	13.14
Abu Dhabi (ADI)	10,336.34	-0.69	-2.05	-2.05	6.00	21.77	1,435 AED	2.07	19.69
Bahrain (BAX)	1,856.60	-0.06	-0.43	-0.45	-1.35	3.30	19 BHD	1.75	15.24
MUSCAT SE INDEX	4,723.75	1.41	2.38	2.38	4.32	14.39	5 OMR	0.95	13.25
SP GCC Comp LMC	177.42	-2.25	-5.28	-5.64	-6.96	-6.50			
SP UAE PRICE INDEX	140.94	-0.96	-2.67	-2.61	1.60	-4.43			
<b>Developed Markets</b>									
MSCI World Index	2,654.34	-0.29	-3.16	-2.45	11.59	-17.87			
U.S. (S&P 500)	3,933.92	-0.19	-3.50	-3.58	9.71	-17.46			
U.K. (FTSE 100)	7,489.19	-0.43	-0.92	-1.11	8.64	1.42			
Japan (Topix)	1,948.31	-0.10	-1.92	-1.88	6.12	-2.21			
<b>Emerging Markets</b>									
MSCI EM Index	958.77	-1.45	-2.00	-1.39	9.48	-22.18			
China (SSE Composite)	3,199.62	-0.40	1.08	1.53	5.79	-12.09			
India (Sensex)	62,410.68	-0.34	-1.38	-1.09	8.68	7.14			
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,430.51	0.10	-1.80	-2.03	4.57	5.50	48.01 KWD	2.17	30.27
Kuwait Premier Index	8,284.80	0.08	-2.09	-2.44	4.21	8.45	37.87 KWD	2.30	25.62
Kuwait Main Index	5,661.24	0.21	-0.61	-0.35	6.05	-3.82	10.14 KWD	1.68	47.76
NIC 50	9,295.11	0.05	-2.10	-2.45	4.20	9.07	28.60 KWD	2.28	24.62
<b>Kuwait Sector</b>									
Banking	1,819.18	0.14	-2.07	-2.45	4.35	12.10	30.61 KWD	1.35	26.62
Telecom	1,205.74	0.41	-1.29	-0.69	3.64	10.68	3.70 KWD	2.09	12.43
Industrials	1,109.70	-0.32	-1.69	-2.33	9.16	-2.78	3.91 KWD	0.81	18.99
Financial services	1,314.75	-0.01	-1.71	-1.35	4.87	-7.63	3.69 KWD	0.70	15.80
Real estate	1,254.95	-0.03	-1.56	-2.08	4.39	-5.39	2.70 KWD	0.58	21.80
Basic materials	876.02	-0.32	-1.28	-0.64	-2.81	-14.52	0.77 KWD	1.28	8.49
Health care	454.28	0.00	0.00	0.00	-1.19	-43.00	0.23 KWD	2.64	11.08
Consumer services	516.02	0.80	6.51	5.61	10.42	-29.42	0.76 KWD	0.94	11.85
Insurance	1,546.77	-0.16	-1.06	0.19	3.04	0.87	0.64 KWD	0.82	9.27
Consumer Disc	1,474.81	0.72	0.34	-0.29	6.47	10.34	0.16 KWD	1.05	0.00
Energy	1,132.83	1.82	2.06	3.79	6.12	-20.68	0.24 KWD	0.79	4.70
Technology	726.04	-7.59	-4.95	-5.85	23.21	6.17	0.01 KWD	0.89	0.00
Utilities	505.26	-1.54	-2.54	-2.54	-1.54	-15.79	0.21 KWD	1.78	15.79



### What Move the GCC markets

#### Oil Prices

Oil prices were mixed in early Asian trade on Wednesday after falling to their lowest settlement levels this year as economic uncertainty and the prospect of higher interest rates pressured prices. Brent crude futures rose 17 cents, or 0.2%, at 0107 GMT to \$79.52 a barrel.

#### Kuwait Market

The market closed up today by + 0.10% at 7,430.51 value traded 40.5 million KD, Premier market value traded reached 30.3 million KD and up by +0.08% at 8,284.80

#### KSA Market

The market closed down today by - 2.48% at 10,185.14.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



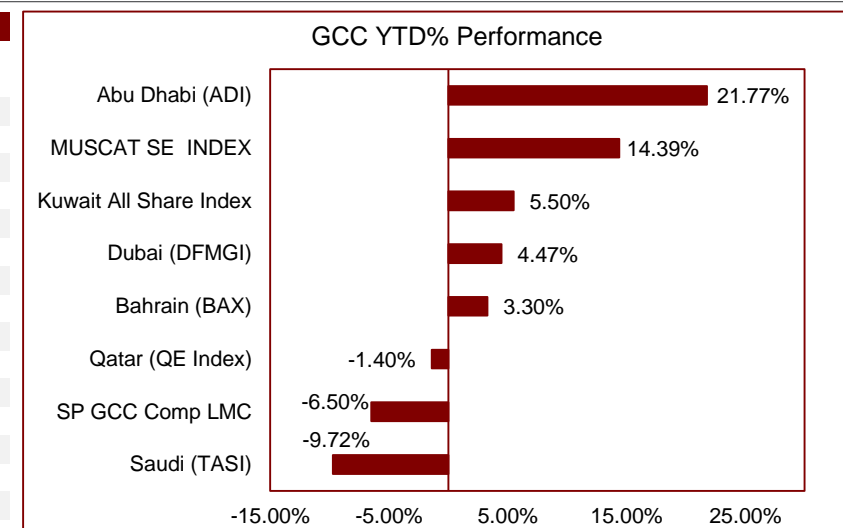
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.080	-0.46	-3.66	-3.74	10.66	13.74	8.15 KWD	2.07	27.00
KFH	0.844	0.24	-1.97	-2.54	0.36	11.59	11.32 KWD	3.48	32.00
Zain	0.581	0.00	-1.02	-1.02	-0.68	-2.35	2.51 KWD	2.09	12.43
BOUBYAN BANK	0.820	0.61	-1.80	-2.84	7.19	15.11	3.06 KWD	3.25	34.00
Agility	0.758	-0.66	-2.45	-3.68	13.47	-3.75	2.03 KWD	1.40	49.54
<b>Saudi Arabia</b>									
ARAMCO	31.75	-1.24	-4.08	-5.22	-11.44	-2.44	6,986.86 SAR	5.03	12.29
SABIC	80.00	-2.44	-4.76	-3.61	-9.91	-31.03	240.06 SAR	1.31	35.00
STC	36.00	-1.77	-4.00	-6.37	-8.51	-19.93	180.05 SAR	2.45	15.22
AL-RAJHI BANK	74.00	-4.88	-7.62	-8.07	-8.98	-16.50	296.08 SAR	3.44	20.46
NCB	46.30	-3.14	-8.86	-9.92	-26.62	-28.11	207.39 SAR	1.27	11.53
<b>United Arab Emirates</b>									
ETISALAT.AD	24.56	-2.23	-4.81	-4.81	5.14	-22.52	218.46 AED	4.59	23.45
FAB.AD	16.86	-1.86	-4.20	-4.20	-5.60	-9.46	186.26 AED	1.65	13.40
EMIRATES NBD	13.05	1.16	-1.51	-1.51	1.56	-3.69	82.43 AED	0.93	7.79
DB ISLAMIC BK	5.77	0.52	1.58	1.58	-3.51	7.25	41.78 AED	1.03	8.42
EMAAR PROPERT	6.25	0.16	2.80	2.80	7.94	27.81	51.12 AED	0.79	7.20
<b>Qatar</b>									
QNB	17.70	-4.58	-9.32	-9.69	-11.06	-12.33	164.58 QAR	1.56	12.68
INDUSTRIES QAT	14.53	-1.09	-5.83	-2.42	-14.02	-6.20	88.49 QAR	2.17	9.26
QA ISLAMIC BK	23.11	0.00	-4.50	-4.82	-6.44	26.08	54.97 QAR	2.07	14.82
MASRAF AL RAYA	3.47	-1.90	-2.94	-2.06	-15.90	-25.32	32.44 QAR	1.33	21.68
MESAIEED PETRO	2.23	-0.13	-2.62	-4.42	-5.23	6.56	28.16 QAR	1.63	14.77
<b>OMAN</b>									
BANK MUSCAT	0.296	1.37	5.71	5.71	3.14	28.43	2.22 OMR	1.02	8.33
OMANTEL	0.908	2.25	4.13	4.13	3.18	20.74	0.68 OMR	1.15	7.69
BANK DHOFAR	0.162	2.53	4.52	4.52	14.08	28.57	0.49 QAR	0.68	14.93
NAT BANK OF OMAN	0.295	2.43	2.43	2.43	9.26	49.75	0.48 QAR	0.83	12.71
OMINVEST	0.392	0.00	0.00	0.00	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 +0.1 % The leading sector best performance indices today are Energy 1.82 % Consumer services 0.8 % Consumer Disc 0.72 % respectively

#### KSA

Saudi Armco has a negative performance today by -1.24 %, SABIC has a negative performance today by -2.44 %, STC have negative performance today by -1.77 %, Al Rajhi Bank has a negative performance today by -4.88 %

#### U.A.E

ETISALAT .AD has a negative performance today by -2.23 %, FAB.AD has a negative performance today by -1.86 %



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