

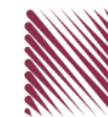


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, December 10th, 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,296.72	0.64	0.64	1.07	2.18	7.81	3.11	18.68	3.27	11,051.16
Qatar (QE Index)	9,778.87	-0.70	-0.70	-2.62	-4.61	-8.45	1.18	11.64	4.98	517.22
Dubai (DFMGI)	3,951.52	-0.12	-0.91	-1.02	-5.09	18.45	1.43	8.87	4.49	573.02
Abu Dhabi (ADI)	9,400.75	-0.74	-1.45	-1.66	-3.93	-7.94	2.44	16.11	2.23	2,607.17
Bahrain (BAX)	1,942.56	0.01	0.01	0.14	0.18	2.50	0.77	9.67	5.99	7.09
Muscat SE INDEX	4,601.54	0.16	0.16	-1.22	-1.45	-5.27	0.82	9.83	4.80	6.41
SP GCC Comp LMC	174.31	0.42	0.42	-0.37	-0.25	-2.50	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.40	0.00	0.00	-2.71	-6.54	-2.98				
Developed Markets										
MSCI World Index	3,047.21	0.32	0.21	0.78	6.80	17.08				
U.S. (S&P 500)	4,604.37	0.41	0.21	0.80	7.38	19.92	4.14	23.19	2.00	40,655.88
U.K. (FTSE 100)	7,554.47	0.54	0.33	1.35	-0.70	1.38	1.58	10.04	3.92	2,008.42
Japan (topix)	2,324.47	-1.50	-2.44	-2.12	0.05	22.88	1.38	13.78	2.33	837,563.57
Emerging Markets										
MSCI EM Index	975.01	0.50	-0.73	-1.23	2.33	1.95				
China (SSE Composite)	2,969.56	0.11	-2.05	-1.98	-4.53	-3.87	1.36	12.00		44,025.04
India (Sensex)	69,825.60	0.44	3.47	4.24	6.07	14.77	4.52	22.73	1.16	136,213.78

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,672.82	0.27	0.27	0.29	-3.11	-8.49	1.41	14.07	3.39	43.43
Kuwait Premier Index	7,299.46	0.23	0.23	0.11	-2.94	-10.06	1.57	15.66	3.23	34.74
Kuwait Main Index	5,505.39	0.43	0.43	0.95	-3.71	-1.63	1.00	9.73	4.08	8.69
Kuwait Sector										
Banking	1,598.73	0.22	0.22	0.15	-4.86	-10.88	1.63	15.92	2.86	27.29
Telecom	1,082.35	0.69	0.69	-0.59	0.94	-8.39	1.63	9.70	6.57	3.30
Industrials	903.02	-0.13	-0.13	-0.36	-1.86	-16.30	1.00	14.11	3.10	3.18
Financial Services	1,228.56	0.59	0.59	2.14	-0.79	-2.28	0.98	11.98	4.05	3.89
Real Estate	1,196.87	0.35	0.35	0.02	1.81	-0.98	0.93	14.10	2.10	2.56
Basic Materials	777.72	-0.54	-0.54	-3.63	-6.65	-10.10	1.36	10.32	10.00	0.44
Health Care	482.15	0.00	0.00	0.00	1.48	4.40	1.75	12.10	1.73	0.24
Consumer Staples	587.72	-0.52	-0.52	-2.33	-1.39	22.45	1.35	12.44	2.09	0.18
Insurance	2,255.61	0.46	0.46	2.51	1.55	45.45	1.26	7.82	4.16	0.90
Consumer Discretionary	1,534.08	0.66	0.66	2.99	-1.48	3.18				
Energy	938.04	-0.55	-0.55	-0.65	-2.42	-17.61	0.74	10.08	5.38	0.20
Technology	609.64	0.00	0.00	0.00	9.68	-12.44	0.75			0.01
Utilities	463.16	0.00	0.00	-1.12	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

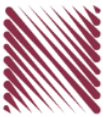
Oil prices rallied Friday, but still booked the seventh straight week of losses as record production and demand worries weigh on prices, The Brent crude contract for February gained \$1.79, or 2.42%, to settle at \$75.84 a barrel.

Kuwait Market

The market closed up by + 0.27 % at 6,672.82 value traded 48.7 million KD, Premier market value reached 35.2 million KD up by + 0.23 % at 7,299.46

KSA Market

The market closed up today by + 0.64 % at 11,296.72



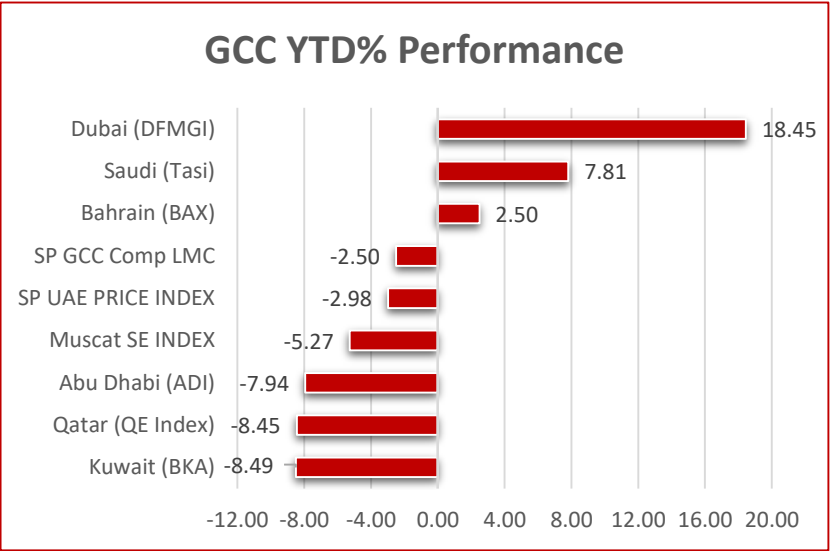
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.879	0.11	0.11	-0.68	-2.98	-14.38	1.66	12.81	3.85	6.98
KFH	0.700	-0.14	-0.14	0.14	-4.50	-6.44	1.79	17.29	2.40	10.35
ZAIN	0.492	0.82	0.82	0.61	1.03	-12.61	1.71	9.84	7.11	2.13
BOUBYAN BANK	0.583	0.34	0.34	0.00	-3.48	-22.56	2.34	35.99	0.97	2.31
AGILITY	0.527	0.38	0.38	-2.41	-5.56	-26.81	0.76	15.98	0.00	1.41
Saudi Arabia										
ARAMCO	32.95	-0.30	-0.30	-0.75	-5.86	12.91	5.16	16.77	4.60	7,973.90
SABIC	79.90	-0.12	-0.12	0.88	-3.15	-10.63	1.38	77.94	4.76	239.70
STC	38.40	0.66	0.66	-0.13	2.13	4.92	2.43	13.94	4.17	192.00
AL-RAJHI BANK	78.50	2.75	2.75	2.75	15.61	4.39	3.07	18.63	2.26	314.00
NCB	34.95	0.72	0.72	0.00	6.55	-7.27	1.23	10.90	3.71	209.70
Abu Dhabi										
ETISALAT.AD	18.70	-2.81	-3.41	-3.21	-8.51	-18.20	3.97	15.72	4.28	162.63
FAB.AD	13.26	-1.19	-3.21	-3.35	-2.50	-22.46	1.22	10.31	3.92	146.49
EMIRATES NBD	17.45	-0.85	-0.29	-0.85	-1.97	34.23	1.05	5.27	3.44	110.22
DB ISLAMIC DB	5.61	0.72	1.26	1.63	-4.10	-1.58	0.94	7.11	5.35	40.62
EMAR.DU	7.38	-0.94	-2.25	-2.77	-8.21	25.94	0.88	6.81	3.39	65.23
Qatar										
QNB	15.500	-1.71	-1.71	-1.27	0.65	-13.89	1.33	10.16	3.87	143.07
INDUSTREIS QAT	12.020	-0.58	-0.58	-3.84	-12.33	-6.17	1.88	15.58	9.15	72.67
QA ISLAMIC BK	18.110	-0.77	-0.77	-4.68	-2.42	-2.42	1.50	10.64	3.45	42.76
MASRAF AL RAYA	2.366	-0.67	-0.67	-4.83	6.15	-25.39	0.90	18.71	4.23	21.99
MESAIEED PETRO	1.565	-0.13	-0.13	-6.79	-15.63	-26.42	1.17	17.17	7.03	19.65
Oman										
BANK MUSCAT	0.27	-0.37	-0.37	-0.74	-2.88	-1.82	0.88	10.23	5.56	2.02
OMANTEL	1.080	0.00	0.00	0.00	9.09	17.39	1.27	29.88	3.01	0.81
BANK DHOFAR	0.160	0.00	0.00	-1.23	-5.88	-8.57	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.275	0.00	0.00	-3.51	-11.00	-4.84	0.67	9.93	2.69	0.45
OMINVEST	0.460	0.00	0.00	-2.13	16.75	9.52	1.01	12.59	3.26	0.31

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-November-23	24.39%	14.80%	0.06%	1.97%	0.20%	5.38%	17.57%	13.13%	6.08%	5.19%
6-December-23	24.46%	14.87%	0.06%	1.97%	0.19%	5.42%	17.56%	13.15%	6.10%	5.22%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.27 % The leading sector best performance indices today are Telecom 0.69 % Consumer Disc 0.66 % Financial services 0.59 % respectively

KSA

Saudi Armco has a negative performance today by - 0.30 %, SABIC has a negative performance today by – 0.12 %, STC has a positive performance today by + 0.66 %, Al Rajhi Bank has a positive performance today by + 2.75 %

U.A.E

ETISALAT .AD has a negative performance today by – 2.81 %, FAB.AD has a negative performance today by – 1.19 %



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