



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 11th, 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)	11,380.95	0.75	1.39	1.82	2.94	8.61	3.11	18.70	3.26	11,097.47
Qatar (QE Index)	9,736.35	-0.43	-1.14	-3.04	-5.03	-8.84	1.18	11.59	5.00	513.82
Dubai (DFMGI)	3,934.52	-0.43	-0.43	-1.45	-5.50	17.94	1.43	8.83	4.51	568.78
Abu Dhabi (ADI)	9,411.75	0.12	0.12	-1.55	-3.82	-7.83	2.44	16.14	2.23	2,614.99
Bahrain (BAX)	1,940.23	-0.12	-0.11	0.02	0.06	2.37	0.77	9.65	6.00	7.08
Muscat SE INDEX	4,588.07	-0.29	-0.14	-1.50	-1.73	-5.55	0.82	9.80	4.81	6.40
SP GCC Comp LMC	175.29	0.56	0.98	0.20	0.31	-1.95	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.96	-0.33	-0.33	-3.03	-6.85	-3.30				
Developed Markets										
MSCI World Index	3,056.42	0.30	0.30	1.08	7.12	17.43				
U.S. (S&P 500)	4,622.44	0.39	0.39	1.20	7.80	20.39	4.14	23.19	2.00	40,655.89
U.K. (FTSE 100)	7,544.89	-0.13	-0.13	1.22	-0.83	1.25	1.58	10.02	3.92	2,006.16
Japan (topix)	2,358.55	1.47	1.47	-0.69	1.51	24.68	1.40	13.98	2.30	849,362.07
Emerging Markets										
MSCI EM Index	973.23	-0.18	-0.18	-1.40	2.15	1.76				
China (SSE Composite)	2,991.44	0.74	0.74	-1.26	-3.83	-3.17	1.36	12.00		44,025.04
India (Sensex)	69,928.53	0.15	0.15	4.39	6.23	14.94	4.53	22.76	1.16	136,475.99

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,710.63	0.57	0.84	0.85	-2.56	-7.97	1.41	14.11	3.38	43.54
Kuwait Premier Index	7,347.41	0.66	0.89	0.76	-2.31	-9.47	1.57	15.69	3.22	34.82
Kuwait Main Index	5,518.06	0.23	0.67	1.18	-3.49	-1.41	1.01	9.77	4.06	8.73
Kuwait Sector										
Banking	1,609.90	0.70	0.92	0.85	-4.19	-10.26	1.63	15.95	2.86	27.34
Telecom	1,089.38	0.65	1.34	0.06	1.59	-7.79	1.64	9.77	6.52	3.32
Industrials	901.03	-0.22	-0.35	-0.58	-2.07	-16.48	1.00	14.10	3.10	3.17
Financial Services	1,235.35	0.55	1.15	2.70	-0.24	-1.74	0.98	12.05	4.03	3.92
Real Estate	1,196.13	-0.06	0.29	-0.04	1.75	-1.04	0.93	14.16	2.09	2.57
Basic Materials	766.37	-1.46	-1.99	-5.04	-8.01	-11.41	1.35	10.27	10.05	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	602.10	2.45	1.91	0.05	1.03	25.45	1.35	12.37	2.10	0.18
Insurance	2,299.43	1.94	2.41	4.50	3.52	48.27	1.27	7.86	4.14	0.91
Consumer Discretionary	1,545.60	0.75	1.42	3.76	-0.74	3.95				
Energy	944.10	0.65	0.09	-0.01	-1.79	-17.08	0.74	10.02	5.41	0.20
Technology	585.64	-3.94	-3.94	-3.94	5.37	-15.88	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 inched higher on Monday, extending gains for a second session as U.S. efforts to replenish strategic reserves provided some support, although concerns of crude oversupply and softer fuel demand growth next year lingered. Brent crude futures rose 11 cents, or 0.2%, to \$75.95 a barrel.

Kuwait Market

The market closed up by + 0.57 % at 6,710.63 value traded 67.9 million KD, Premier market value reached 51.0 million KD up by + 0.66 % at 7,347.41

KSA Market

The market closed up today by + 0.75 % at 11,380.95

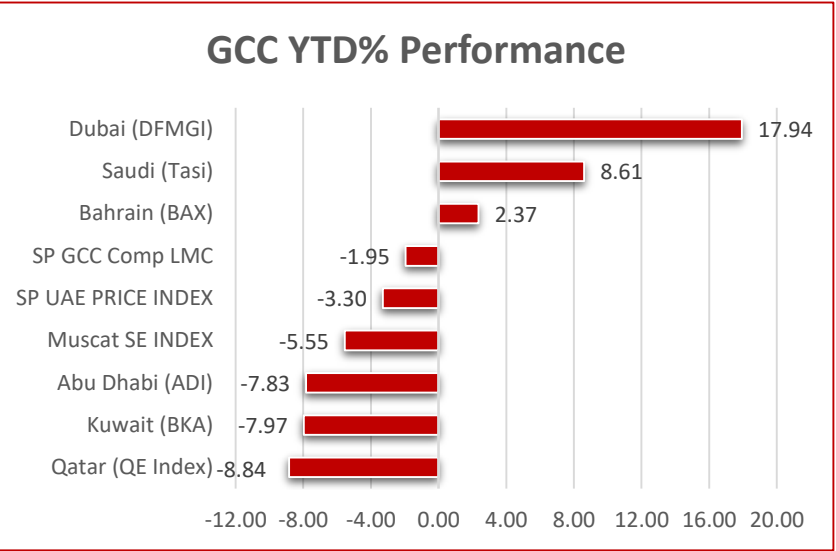


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.888	1.02	1.14	0.34	-1.99	-13.51	1.68	12.94	3.81	7.04
KFH	0.703	0.43	0.29	0.57	-4.09	-6.04	1.80	17.36	2.39	10.38
ZAIN	0.498	1.22	2.05	1.84	2.26	-11.55	1.73	9.96	7.03	2.16
BOUBYAN BANK	0.587	0.69	1.03	0.69	-2.81	-22.03	2.36	36.23	0.96	2.33
AGILITY	0.524	-0.57	-0.19	-2.96	-6.09	-27.22	0.75	15.89	0.00	1.40
Saudi Arabia										
ARAMCO	33.05	0.30	0.00	-0.45	-5.57	13.26	5.17	16.82	4.59	7,998.10
SABIC	80.40	0.63	0.50	1.52	-2.55	-10.07	1.39	78.43	4.73	241.20
STC	40.00	4.17	4.85	4.03	6.38	9.29	2.53	14.52	4.00	200.00
AL-RAJHI BANK	80.20	2.17	4.97	4.97	18.11	6.65	3.14	19.03	2.21	320.80
NCB	35.50	1.57	2.31	1.57	8.23	-5.81	1.25	11.07	3.66	213.00
Abu Dhabi										
ETISALAT.AD	18.94	1.28	1.28	-1.97	-7.34	-17.15	4.02	15.92	4.22	164.72
FAB.AD	13.30	0.30	0.30	-3.06	-2.21	-22.22	1.22	10.34	3.91	146.94
EMIRATES NBD	17.40	-0.29	-0.29	-1.14	-2.25	33.85	1.05	5.26	3.45	109.91
DB ISLAMIC DB	5.56	-0.89	-0.89	0.72	-4.96	-2.46	0.93	7.05	5.40	40.26
EMAR.DU	7.30	-1.08	-1.08	-3.82	-9.20	24.57	0.87	6.74	3.42	64.52
Qatar										
QNB	15.200	-1.94	-3.61	-3.18	-1.30	-15.56	1.31	9.97	3.95	140.51
INDUSTREIS QAT	11.990	-0.25	-0.83	-4.08	-12.55	-6.40	1.88	15.54	9.17	72.60
QA ISLAMIC BK	18.160	0.28	-0.49	-4.42	-2.16	-2.16	1.50	10.67	3.44	42.95
MASRAF AL RAYA	2.334	-1.35	-2.02	-6.11	4.71	-26.40	0.89	18.46	4.28	21.72
MESAIEED PETRO	1.551	-0.89	-1.02	-7.62	-16.39	-27.08	1.15	17.02	7.09	19.50
Oman										
BANK MUSCAT	0.27	0.00	-0.37	-0.74	-2.88	-1.82	0.88	10.23	5.56	2.03
OMANTEL	1.070	-0.93	-0.93	-0.93	8.08	16.30	1.26	29.60	3.04	0.80
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 + 0.57 % The leading sector best performance indices today are Consumer Staples + 2.45 % Insurance + 1.94 % Consumer Discretionary + 0.75 % respectively

KSA

Saudi Armco has a positive performance today by + 0.30 %, SABIC has a positive performance today by + 0.63 %, STC has a positive performance today by + 4.17 %, Al Rajhi Bank has a positive performance today by + 2.17 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.28 %, FAB.AD has a positive performance today by + 0.30 %



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