

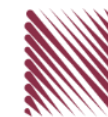


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

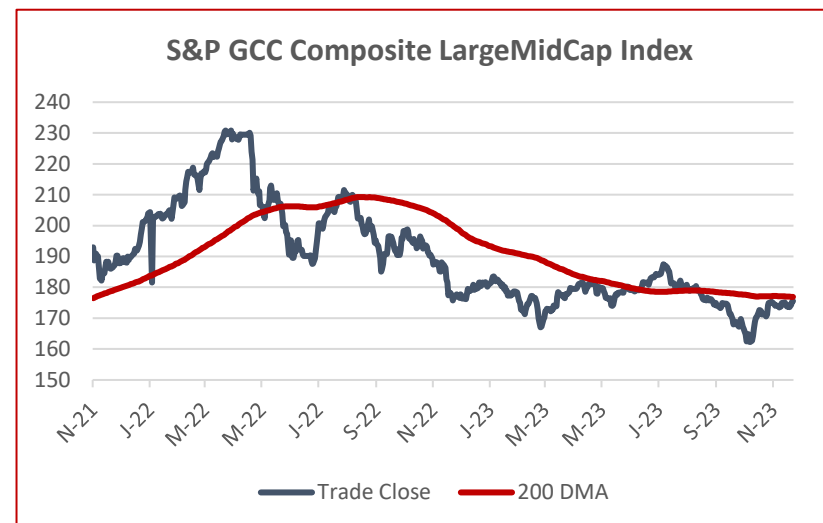
Tuesday, December 12th, 2023





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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)	11,395.00	0.12	1.51	1.95	3.07	8.75	3.11	18.72	3.21	11,077.52
Qatar (QE Index)	9,726.75	-0.10	-1.23	-3.14	-5.12	-8.93	1.17	11.58	5.01	512.79
Dubai (DFMGI)	3,937.28	0.07	-0.36	-1.38	-5.44	18.02	1.43	8.82	4.51	568.94
Abu Dhabi (ADI)	9,449.10	0.40	0.51	-1.16	-3.44	-7.46	2.45	16.21	2.22	2,628.78
Bahrain (BAX)	1,939.72	-0.03	-0.14	0.00	0.03	2.35	0.77	9.64	6.01	7.08
Muscat SE INDEX	4,585.32	-0.06	-0.20	-1.56	-1.79	-5.60	0.82	9.78	4.82	6.38
SP GCC Comp LMC	175.52	0.13	1.11	0.32	0.44	-1.82	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.99	0.03	-0.30	-3.01	-6.82	-3.28				
Developed Markets										
MSCI World Index	3,067.44	0.36	0.66	1.45	7.51	17.86				
U.S. (S&P 500)	4,643.70	0.46	0.85	1.66	8.29	20.95	4.15	23.27	1.99	40,798.21
U.K. (FTSE 100)	7,542.77	-0.03	-0.15	1.19	-0.86	1.22	1.58	10.02	3.92	2,005.01
Japan (topix)	2,353.16	-0.23	1.23	-0.92	1.28	24.39	1.40	13.95	2.30	847,415.34
Emerging Markets										
MSCI EM Index	976.58	0.34	0.16	-1.07	2.50	2.11				
China (SSE Composite)	3,003.44	0.40	1.14	-0.87	-3.44	-2.78	1.36	12.00		44,025.04
India (Sensex)	69,551.03	-0.54	-0.39	3.83	5.66	14.32	4.50	22.64	1.16	135,884.15
Kuwait										
Kuwait All Share Index	6,770.75	0.90	1.74	1.76	-1.68	-7.15	1.42	14.18	3.37	43.72
Kuwait Premier Index	7,425.92	1.07	1.97	1.84	-1.26	-8.50	1.58	15.79	3.20	35.02
Kuwait Main Index	5,531.84	0.25	0.92	1.44	-3.25	-1.16	1.01	9.77	4.07	8.70
Kuwait Sector										
Banking	1,632.07	1.38	2.31	2.24	-2.87	-9.02	1.64	16.05	2.84	27.51
Telecom	1,090.14	0.07	1.41	0.12	1.66	-7.73	1.65	9.83	6.48	3.34
Industrials	902.13	0.12	-0.22	-0.46	-1.95	-16.38	1.01	13.94	3.16	3.12
Financial Services	1,236.30	0.08	1.22	2.78	-0.17	-1.67	0.99	12.14	4.01	3.94
Real Estate	1,198.68	0.21	0.50	0.17	1.97	-0.83	0.93	14.16	2.09	2.57
Basic Materials	760.65	-0.75	-2.73	-5.74	-8.69	-12.07	1.33	10.12	10.20	0.43
Health Care	482.45	0.06	0.06	0.06	1.54	4.46	1.75	12.10	1.73	0.24
Consumer Staples	600.04	-0.34	1.56	-0.29	0.68	25.02	1.38	12.71	2.05	0.18
Insurance	2,298.66	-0.03	2.38	4.47	3.49	48.22	1.29	8.02	4.06	0.93
Consumer Discretionary	1,557.11	0.74	2.17	4.53	0.00	4.73				
Energy	990.57	4.92	5.02	4.91	3.05	-12.99	0.75	10.09	5.38	0.20
Technology	585.64	0.00	-3.94	-3.94	5.37	-15.88	0.72			0.01
Utilities	463.16	0.00	0.00	-1.12	-5.38	-6.38				



What Move the GCC markets

Oil Prices

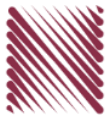
U.S. crude oil on Tuesday dropped nearly 4% as inflation data stoked anxiety among traders that the Federal Reserve may not be ready to ease up on interest rates. The West Texas Intermediate contract for January lost \$2.71, or 3.80%, to settle at \$68.61 a barrel.

Kuwait Market

The market closed up by + 0.90 % at 6,770.75 value traded 79.4 million KD, Premier market value reached 66.5 million KD up by + 1.07 % at 7,425.92

KSA Market

The market closed up today by + 0.12 % at 11,395.00

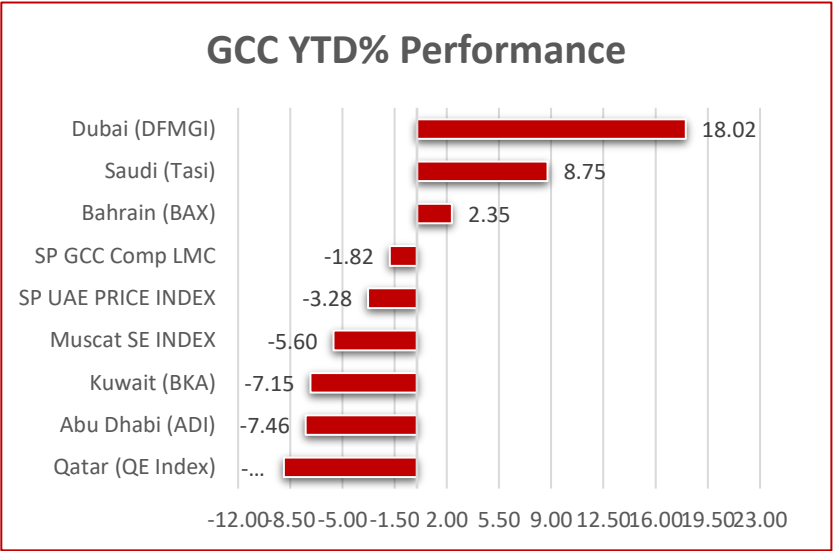


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.895	0.79	1.94	1.13	-1.21	-12.82	1.69	13.05	3.78	7.09
KFH	0.718	2.13	2.43	2.72	-2.05	-4.03	1.84	17.73	2.34	10.60
ZAIN	0.499	0.20	2.25	2.04	2.46	-11.37	1.73	9.98	7.01	2.16
BOUBYAN BANK	0.592	0.85	1.89	1.54	-1.99	-21.36	2.38	36.54	0.96	2.34
AGILITY	0.520	-0.76	-0.95	-3.70	-6.81	-27.78	0.75	15.77	0.00	1.39
Saudi Arabia										
ARAMCO	32.95	-0.30	-0.30	-0.75	-5.86	12.91	5.16	16.77	4.60	7,974.33
SABIC	78.90	-1.87	-1.37	-0.38	-4.36	-11.74	1.36	76.96	4.31	236.71
STC	39.05	-2.38	2.36	1.56	3.86	6.69	2.47	14.17	4.10	195.26
AL-RAJHI BANK	80.10	-0.12	4.84	4.84	17.97	6.52	3.13	19.01	2.22	320.42
NCB	35.90	1.13	3.46	2.72	9.45	-4.75	1.27	11.20	3.62	215.41
Abu Dhabi										
ETISALAT.AD	18.94	0.00	1.28	-1.97	-7.34	-17.15	4.02	15.92	4.22	164.72
FAB.AD	13.34	0.30	0.60	-2.77	-1.91	-21.99	1.23	10.37	3.90	147.38
EMIRATES NBD	17.25	-0.86	-1.15	-1.99	-3.09	32.69	1.04	5.21	3.48	108.96
DB ISLAMIC DB	5.53	-0.54	-1.43	0.18	-5.47	-2.98	0.92	7.01	5.42	40.04
EMAR.DU	7.24	-0.82	-1.90	-4.61	-9.95	23.55	0.86	6.68	3.45	63.99
Qatar										
QNB	15.050	-0.99	-4.57	-4.14	-2.27	-16.39	1.29	9.87	3.99	139.05
INDUSTREIS QAT	12.100	0.92	0.08	-3.20	-11.74	-5.54	1.89	15.68	9.09	73.23
QA ISLAMIC BK	18.140	-0.11	-0.60	-4.53	-2.26	-2.26	1.50	10.66	3.45	42.88
MASRAF AL RAYA	2.320	-0.60	-2.60	-6.68	4.08	-26.84	0.88	18.35	4.31	21.58
MESAIEED PETRO	1.558	0.45	-0.57	-7.21	-16.01	-26.75	1.16	17.09	7.06	19.58
Oman										
BANK MUSCAT	0.269	-0.37	-0.74	-1.10	-3.24	-2.18	0.88	10.19	5.58	2.02
OMANTEL	1.060	-0.93	-1.85	-1.85	7.07	15.22	1.24	29.32	3.07	0.79
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	0.280	1.82	1.82	-1.75	-9.39	-3.11	0.68	10.11	2.64	0.46
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 + 0.9 %The leading sector best performance indices today are Energy 4.92 % Banking 1.38 % Consumer Disc 0.74 % respectively.

KSA

Saudi Armco have negative performance today by -0.3 %, SABIC have negative performance today by -1.86%. STC have negative performance today by -2.38 %, Al Rajhi Bank have negative performance today by -0.12 %.

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD has a positive performance today by + 0.3 %



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