



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, November 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)	10,833.64	-0.07	-0.07	1.34	-2.01	3.39	2.99	18.04	3.38	11,025.14
Qatar (QE Index)	10,006.93	0.30	0.30	5.08	-2.39	-6.31	1.21	11.91	4.87	530.24
Dubai (DFMGI)	3,969.28	1.01	1.00	2.38	-4.67	18.98	1.45	9.36	4.46	571.89
Abu Dhabi (ADI)	9,548.88	0.21	0.40	2.19	-2.42	-6.49	2.49	16.38	2.19	2,667.12
Bahrain (BAX)	1,930.12	-0.08	-0.08	0.04	-0.46	1.84	0.76	9.77	6.03	7.04
Muscat SE INDEX	4,560.45	0.47	0.47	0.33	-2.33	-6.11	0.81	9.40	4.89	6.30
SP GCC Comp LMC	171.31	-0.05	-0.05	2.78	-1.97	-4.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.72	0.00	0.00	4.22	-4.91	-1.29				
Developed Markets										
MSCI World Index	2,900.76	0.76	0.59	4.77	1.67	11.45				
U.S. (S&P 500)	4,415.24	1.56	1.31	5.28	2.97	15.00	3.97	22.48	2.07	39,008.29
U.K. (FTSE 100)	7,360.55	-1.28	-0.77	0.53	-3.25	-1.22	1.53	9.75	4.02	1,955.32
Japan (topix)	2,336.72	0.07	0.62	3.68	0.57	23.52	1.36	13.84	2.28	844,721.64
Emerging Markets										
MSCI EM Index	948.32	-0.83	0.01	3.62	-0.47	-0.84				
China (SSE Composite)	3,038.97	-0.47	0.27	0.67	-2.30	-1.63	1.36	12.00		44,025.04
India (Sensex)	65,259.45	0.55	0.55	2.17	-0.86	7.26	4.19	21.10	1.25	126,873.36

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,605.52	0.22	0.22	1.13	-4.08	-9.42	1.40	14.16	3.42	43.02
Kuwait Premier Index	7,251.83	0.25	0.25	1.53	-3.58	-10.64	1.56	15.86	3.25	34.53
Kuwait Main Index	5,377.23	0.13	0.13	-0.35	-5.95	-3.92	0.98	9.57	4.17	8.49
Kuwait Sector										
Banking	1,598.20	0.26	0.26	1.32	-4.89	-10.91	1.63	15.90	2.87	27.27
Telecom	1,065.18	0.44	0.44	1.13	-0.66	-9.84	1.60	9.75	6.66	3.26
Industrials	899.62	0.62	0.62	1.39	-2.22	-16.62	0.99	15.42	3.13	3.14
Financial Services	1,180.24	0.53	0.53	2.13	-4.69	-6.12	0.94	11.60	4.22	3.74
Real Estate	1,156.84	-0.71	-0.71	0.39	-1.59	-4.29	0.90	14.41	2.14	2.50
Basic Materials	773.15	1.51	1.51	2.08	-7.19	-10.63	1.33	9.92	10.26	0.43
Health Care	467.32	0.00	0.00	-0.06	-1.64	1.18	1.69	12.00	1.78	0.23
Consumer Staples	591.83	1.23	1.23	1.17	-0.70	23.31	1.34	73.89	2.11	0.18
Insurance	2,218.53	-0.68	-0.68	-0.87	-0.12	43.06	1.25	7.44	4.18	0.90
Consumer Discretionary	1,435.70	-1.04	-1.04	-4.49	-7.80	-3.44				
Energy	933.50	0.35	0.35	3.53	-2.89	-18.01	0.73	10.03	5.46	0.19
Technology	574.72	-1.25	-1.25	-4.82	3.40	-17.45	0.72			0.01
Utilities	457.89	-0.57	-0.57	0.00	-6.45	-7.45				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were higher on Friday but are set to fall for a third week as concerns of supply disruptions from the Israel-Hamas conflict have ebbed allowing demand worries to reassert themselves. Brent crude futures for January were up 73 cents at \$80.74 a barrel.

Kuwait Market

The market closed up by + 0.22 % at 6,605.52 value traded 32.4 million KD, Premier market value reached 24.6 million KD up by + 0.25 % at 7,251.23

KSA Market

The market closed down today by – 0.07 % at 10,833.64

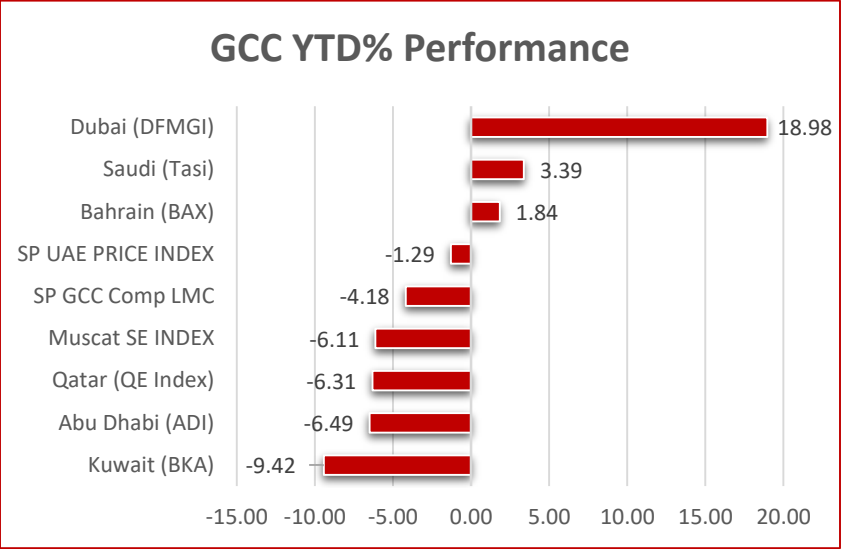


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.888	-0.22	-0.22	1.25	-1.99	-13.51	1.68	12.94	3.81	7.05
KFH	0.698	0.58	0.58	2.05	-4.77	-6.71	1.79	17.24	2.41	10.32
ZAIN	0.482	0.21	0.21	0.21	-1.03	-14.39	1.69	9.93	7.26	2.09
BOUBYAN BANK	0.602	0.50	0.50	2.73	-0.33	-20.04	2.42	37.16	0.94	2.39
AGILITY	0.525	0.38	0.38	-0.19	-5.91	-27.08	0.71	19.49	0.00	1.41
Saudi Arabia										
ARAMCO	33.55	0.15	0.15	0.75	-4.14	14.97	5.25	17.08	4.52	8,119.32
SABIC	77.70	-0.13	-0.13	0.91	-5.82	-13.09	1.34	75.79	4.89	233.11
STC	37.70	-1.31	-1.31	-1.82	0.27	3.01	2.38	13.68	4.24	188.51
AL-RAJHI BANK	70.70	-0.14	-0.14	5.37	4.12	-5.98	2.76	16.78	2.51	282.81
NCB	34.80	-0.71	-0.71	3.73	6.10	-7.67	1.23	10.86	3.73	208.81
Abu Dhabi										
ETISALAT.AD	19.62	0.62	0.62	6.28	-4.01	-14.17	4.09	17.32	4.08	170.63
FAB.AD	13.30	-0.75	0.61	4.89	-2.21	-22.22	1.22	10.34	3.91	146.93
EMIRATES NBD	17.65	-0.84	0.28	4.13	-0.84	35.77	1.06	5.34	3.40	111.49
DB ISLAMIC DB	5.54	0.18	2.21	2.59	-5.30	-2.81	0.93	7.02	5.42	40.11
EMAR.DU	7.10	4.41	3.95	6.13	-11.69	21.16	0.88	7.95	3.52	62.76
Qatar										
QNB	15.890	0.06	0.06	6.72	3.18	-11.72	1.37	10.42	3.78	146.67
INDUSTREIS QAT	12.910	0.23	0.23	5.65	-5.84	0.78	2.02	16.73	8.52	78.05
QA ISLAMIC BK	18.050	0.28	0.28	3.74	-2.75	-2.75	1.49	10.60	3.46	42.62
MASRAF AL RAYA	2.360	1.37	1.37	12.38	5.88	-25.58	0.90	18.66	4.24	21.93
MESAIEED PETRO	1.598	-0.12	-0.12	0.50	-13.85	-24.87	1.19	17.53	6.88	20.06
Oman										
BANK MUSCAT	0.259	2.37	2.37	0.39	-6.83	-5.82	0.84	9.81	5.79	1.94
OMANTEL	1.015	-0.29	-0.29	-1.46	2.53	10.33	1.21	32.83	3.20	0.76
BANK DHOFAR	0.170	0.00	0.00	6.25	0.00	-2.86	0.70	17.54	2.94	0.51
NAT BANK OF OMAN	0.294	0.00	0.00	-3.29	-4.85	1.73	0.72	10.61	2.52	0.48
OMINVEST	0.400	0.00	0.00	-2.44	1.52	-4.76	0.89	5.88	3.75	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-November-23	24.23%	14.64%	0.07%	2.00%	0.22%	5.39%	17.53%	12.98%	6.04%	5.10%
8-November-23	24.27%	14.60%	0.06%	1.99%	0.22%	5.40%	17.54%	12.97%	6.02%	5.12%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.22 % The leading sector top performance indices today are Basic Materials + 1.51 % Consumer Staples + 1.23 % Industrials + 0.62 % respectively

KSA
Saudi Armco has a positive performance today by + 0.15 %, SABIC has a negative performance today by – 0.13 %, STC has a negative performance today by – 1.31 %, Al Rajhi Bank has a negative performance today by – 0.14 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.62 %, FAB.AD has a negative performance today by - 0.75 %



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