



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 13th, 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)	11,401.47	0.06	1.57	2.00	3.13	8.81	3.11	18.69	3.21	11,044.98
Qatar (QE Index)	9,740.11	0.14	-1.10	-3.00	-4.99	-8.81	1.18	11.60	5.00	512.25
Dubai (DFMGI)	3,939.31	0.05	-0.31	-1.33	-5.39	18.08	1.43	8.84	4.50	567.31
Abu Dhabi (ADI)	9,436.77	-0.13	0.38	-1.28	-3.56	-7.58	2.45	16.21	2.22	2,624.38
Bahrain (BAX)	1,923.38	-0.84	-0.98	-0.85	-0.81	1.48	0.76	9.52	6.08	7.02
Muscat SE INDEX	4,575.32	-0.22	-0.42	-1.78	-2.01	-5.81	0.82	9.75	4.84	6.36
SP GCC Comp LMC	175.57	0.03	1.14	0.36	0.47	-1.79	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.76	-0.18	-0.48	-3.18	-6.98	-3.45				

Developed Markets										
MSCI World Index	3,101.08	1.10	1.77	2.56	8.69	19.15				
U.S. (S&P 500)	4,707.09	1.37	2.23	3.05	9.77	22.60	4.17	23.39	1.98	40,967.28
U.K. (FTSE 100)	7,548.44	0.08	-0.08	1.27	-0.78	1.30	1.58	10.03	3.91	2,006.18
Japan (topix)	2,354.92	0.07	1.31	-0.84	1.36	24.49	1.40	13.96	2.30	847,752.15

Emerging Markets										
MSCI EM Index	973.47	-0.32	-0.16	-1.38	2.17	1.79				
China (SSE Composite)	2,968.76	-1.15	-0.03	-2.01	-4.56	-3.90	1.36	12.00		44,025.04
India (Sensex)	69,584.60	0.05	-0.35	3.88	5.71	14.37	4.50	22.65	1.16	135,879.55

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,788.28	0.26	2.01	2.02	-1.43	-6.91	1.43	14.30	3.34	44.08
Kuwait Premier Index	7,455.06	0.39	2.37	2.24	-0.87	-8.14	1.59	15.94	3.17	35.36
Kuwait Main Index	5,518.27	-0.25	0.67	1.19	-3.48	-1.40	1.01	9.79	4.06	8.72

Kuwait Sector										
Banking	1,640.41	0.51	2.83	2.76	-2.38	-8.56	1.66	16.24	2.81	27.84
Telecom	1,085.25	-0.45	0.96	-0.32	1.21	-8.14	1.65	9.84	6.48	3.35
Industrials	904.82	0.30	0.07	-0.16	-1.66	-16.13	1.01	13.95	3.15	3.12
Financial Services	1,236.06	-0.02	1.21	2.76	-0.19	-1.68	0.99	12.17	4.00	3.94
Real Estate	1,200.24	0.13	0.63	0.30	2.10	-0.70	0.93	14.17	2.08	2.57
Basic Materials	754.13	-0.86	-3.56	-6.55	-9.48	-12.83	1.32	10.04	10.28	0.43
Health Care	482.45	0.00	0.06	0.06	1.54	4.46	1.75	12.11	1.72	0.24
Consumer Staples	604.14	0.68	2.26	0.39	1.37	25.88	1.38	12.68	2.05	0.18
Insurance	2,275.90	-0.99	1.36	3.43	2.46	46.75	1.29	8.01	4.06	0.93
Consumer Discretionary	1,552.26	-0.31	1.85	4.21	-0.32	4.40				
Energy	983.62	-0.70	4.28	4.17	2.33	-13.61	0.78	10.59	5.12	0.21
Technology	570.36	-2.61	-6.44	-6.44	2.62	-18.08	0.72			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 rose in early Asian trade on Thursday, extending gains from the previous session following a bigger-than-expected weekly withdrawal from U.S. crude storage and signaling from the U.S. Federal Reserve that it would start lowering borrowing costs in 2024. Lower interest rates cut consumer borrowing costs, which can boost economic growth and demand for oil. The news also sent the dollar falling, which makes oil less expensive for foreign purchasers. Brent futures rose 46 cents, or 0.6%, to settle at \$74.72 a barrel.

Kuwait Market

The market closed up by + 0.26 % at 6,788.28 value traded 55.3 million KD, Premier market value reached 42.7 million KD up by + 0.39 % at 7,455.06

KSA Market

The market closed up today by + 0.06 % at 11,401.47



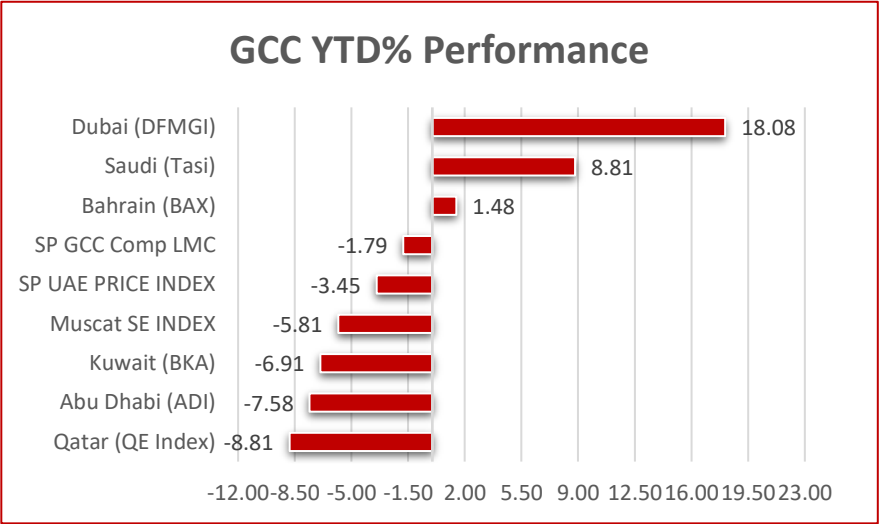
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.903	0.89	2.85	2.03	-0.33	-12.05	1.71	13.16	3.74	7.15
KFH	0.719	0.14	2.57	2.86	-1.91	-3.90	1.84	17.76	2.34	10.59
ZAIN	0.496	-0.60	1.64	1.43	1.85	-11.90	1.72	9.92	7.06	2.14
BOUBYAN BANK	0.598	1.01	2.93	2.57	-0.99	-20.57	2.40	36.91	0.95	2.36
AGILITY	0.519	-0.19	-1.14	-3.89	-6.99	-27.92	0.75	15.74	0.00	1.39
Saudi Arabia										
ARAMCO	32.80	-0.46	-0.76	-1.20	-6.29	12.40	5.14	16.70	4.62	7,937.81
SABIC	79.10	0.25	-1.13	-0.13	-4.12	-11.52	1.36	77.16	4.30	237.31
STC	39.00	-0.13	2.23	1.43	3.72	6.56	2.47	14.15	4.10	195.01
AL-RAJHI BANK	80.30	0.25	5.10	5.10	18.26	6.78	3.14	19.06	2.21	321.21
NCB	36.00	0.28	3.75	3.00	9.76	-4.48	1.27	11.23	3.60	216.01
Abu Dhabi										
ETISALAT.AD	19.06	0.63	1.93	-1.35	-6.75	-16.62	4.05	16.02	4.20	165.77
FAB.AD	13.30	-0.30	0.30	-3.06	-2.21	-22.22	1.22	10.34	3.91	146.95
EMIRATES NBD	16.95	-1.74	-2.87	-3.69	-4.78	30.38	1.02	5.12	3.54	107.08
DB ISLAMIC DB	5.61	1.45	0.00	1.63	-4.10	-1.58	0.94	7.11	5.35	40.62
EMAR.DU	7.31	0.97	-0.95	-3.69	-9.08	24.74	0.87	6.75	3.42	64.62
Qatar										
QNB	14.800	-1.66	-6.15	-5.73	-3.90	-17.78	1.27	9.70	4.05	136.60
INDUSTREIS QAT	12.220	0.99	1.08	-2.24	-10.87	-4.61	1.91	15.84	9.00	73.88
QA ISLAMIC BK	18.450	1.71	1.10	-2.89	-0.59	-0.59	1.52	10.84	3.39	43.56
MASRAF AL RAYA	2.340	0.86	-1.76	-5.87	4.98	-26.21	0.89	18.51	4.27	21.75
MESAIEED PETRO	1.555	-0.19	-0.77	-7.39	-16.17	-26.89	1.16	17.06	7.07	19.52
Oman										
BANK MUSCAT	0.267	-0.74	-1.48	-1.84	-3.96	-2.91	0.87	10.12	5.62	2.00
OMANTEL	1.051	-0.85	-2.69	-2.69	6.16	14.24	1.23	29.07	3.09	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	0.284	1.43	3.27	-0.35	-8.09	-1.73	0.69	10.25	2.61	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 + 0.26 %The leading sector best performance indices today are Consumer services 0.68 % Banking 0.51 % Industrials 0.3 % respectively

KSA

Saudi Armco have negative performance today by -0.46 %, SABIC have positive performance today by + 0.25 %. STC have negative performance today by -0.13 %, Al Rajhi Bank has a positive performance today by + 0.25 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.63 %, FAB.AD have negative performance today by -0.3 %



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