



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, November 14<sup>th</sup> 2023





Tuesday, November 14, 2023

| Market Watch             | Close Price | DTD   | WTD   | MTD  | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |      |       |       |      |       |                |                       |
| Saudi (Tasi)             | 10,857.10   | 0.62  | 0.15  | 1.56 | -1.80 | 3.61  | 2.99 | 18.10 | 3.36           | 11,114.12             |
| Qatar (QE Index)         | 10,016.65   | -0.18 | 0.40  | 5.18 | -2.30 | -6.22 | 1.21 | 11.92 | 4.87           | 529.15                |
| Dubai (DFMGI)            | 3,973.21    | -0.24 | 0.10  | 2.48 | -4.57 | 19.10 | 1.44 | 9.32  | 4.48           | 573.62                |
| Abu Dhabi (ADI)          | 9,529.56    | -0.08 | -0.20 | 1.99 | -2.61 | -6.67 | 2.48 | 16.59 | 2.20           | 2,654.22              |
| Bahrain (BAX)            | 1,938.79    | 0.24  | 0.37  | 0.49 | -0.02 | 2.30  | 0.77 | 9.86  | 6.00           | 7.08                  |
| Muscat SE INDEX          | 4,576.22    | 0.25  | 0.82  | 0.68 | -1.99 | -5.79 | 0.82 | 9.51  | 4.83           | 6.38                  |
| SP GCC Comp LMC          | 170.54      | 0.39  | -0.11 | 2.72 | -2.03 | -4.24 | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 135.59      | -0.16 | -0.26 | 3.95 | -5.15 | -1.55 |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |      |       |       |      |       |                |                       |
| MSCI World Index         | 2,904.64    | 2.02  | 2.16  | 7.03 | 3.86  | 13.86 |      |       |                |                       |
| U.S. (S&P 500)           | 4,411.55    | 1.91  | 1.82  | 7.20 | 4.84  | 17.09 | 3.97 | 22.46 | 2.08           | 38,982.84             |
| U.K. (FTSE 100)          | 7,440.47    | 0.20  | 1.09  | 1.62 | -2.20 | -0.15 | 1.56 | 9.87  | 3.98           | 1,976.48              |
| Japan (topix)            | 2,345.29    | 0.37  | 0.37  | 4.06 | 0.94  | 23.98 | 1.37 | 13.87 | 2.30           | 847,505.44            |
| <b>Emerging Markets</b>  |             |       |       |      |       |       |      |       |                |                       |
| MSCI EM Index            | 952.27      | 0.72  | 1.14  | 4.80 | 0.67  | 0.29  |      |       |                |                       |
| China (SSE Composite)    | 3,056.07    | 0.31  | 0.56  | 1.24 | -1.75 | -1.07 | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 64,933.87   | -0.50 | 0.04  | 1.66 | -1.36 | 6.73  | 4.20 | 21.13 | 1.25           | 127,022.98            |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |       |        |      |       |                |                       |
| Kuwait All Share Index | 6,554.64    | -0.09 | -0.55 | 0.35  | -4.82 | -10.11 | 1.39 | 14.02 | 3.44           | 42.84                 |
| Kuwait Premier Index   | 7,180.61    | -0.17 | -0.73 | 0.53  | -4.52 | -11.52 | 1.55 | 15.69 | 3.26           | 34.35                 |
| Kuwait Main Index      | 5,378.73    | 0.23  | 0.16  | -0.32 | -5.92 | -3.90  | 0.98 | 9.49  | 4.17           | 8.49                  |
| <b>Kuwait Sector</b>   |             |       |       |       |       |        |      |       |                |                       |
| Banking                | 1,576.10    | -0.36 | -1.13 | -0.08 | -6.20 | -12.14 | 1.62 | 15.79 | 2.89           | 27.09                 |
| Telecom                | 1,079.33    | 1.64  | 1.78  | 2.47  | 0.66  | -8.64  | 1.61 | 9.76  | 6.65           | 3.26                  |
| Industrials            | 894.24      | -0.69 | 0.02  | 0.79  | -2.81 | -17.11 | 1.01 | 15.52 | 3.11           | 3.16                  |
| Financial Services     | 1,176.30    | 0.33  | 0.20  | 1.79  | -5.01 | -6.44  | 0.94 | 11.47 | 4.22           | 3.73                  |
| Real Estate            | 1,158.83    | -0.23 | -0.54 | 0.57  | -1.42 | -4.13  | 0.90 | 14.10 | 2.15           | 2.49                  |
| Basic Materials        | 778.30      | 1.16  | 2.18  | 2.76  | -6.58 | -10.03 | 1.34 | 10.02 | 10.16          | 0.43                  |
| Health Care            | 476.40      | 3.35  | 1.94  | 1.88  | 0.27  | 3.15   | 1.67 | 11.84 | 1.80           | 0.23                  |
| Consumer Staples       | 591.83      | 0.52  | 1.23  | 1.17  | -0.70 | 23.31  | 1.35 |       | 2.09           | 0.18                  |
| Insurance              | 2,234.27    | 0.34  | 0.02  | -0.16 | 0.59  | 44.07  | 1.24 | 7.41  | 4.19           | 0.90                  |
| Consumer Discretionary | 1,424.51    | -0.62 | -1.81 | -5.23 | -8.52 | -4.19  |      |       |                |                       |
| Energy                 | 942.20      | 0.69  | 1.28  | 4.49  | -1.98 | -17.24 | 0.74 | 10.09 | 5.42           | 0.20                  |
| Technology             | 574.72      | 0.00  | -1.25 | -4.82 | 3.40  | -17.45 | 0.71 |       |                | 0.01                  |
| Utilities              | 460.53      | 0.00  | 0.00  | 0.58  | -5.91 | -6.91  |      |       |                |                       |

S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices inched up on Tuesday after an OPEC report said market fundamentals remained strong and due to concerns supplies might be disrupted as the U.S. cracks down on Russian oil exports. Brent crude futures rose 33 cents, or 0.4%, to \$82.85 a barrel.

#### Kuwait Market

The market closed down by – 0.09 % at 6,554.64 value traded 42.2 million KD, Premier market value reached 30.5 million KD down by – 0.17 % at 7,180.61

#### KSA Market

The market closed up today by + 0.62 % at 10,857.10

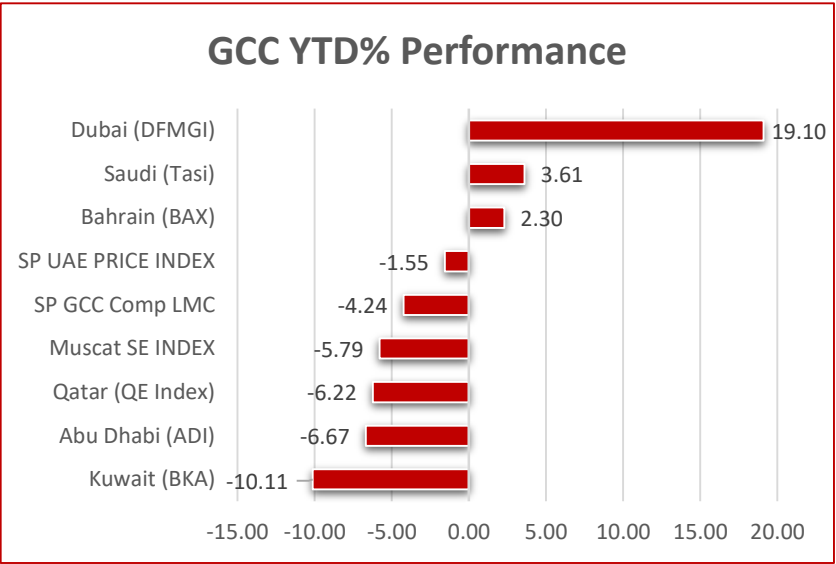


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|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |        |        |      |       |                |                       |
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| NBK                    | 0.866       | -0.69 | -2.70 | -1.25 | -4.42  | -15.65 | 1.64 | 12.62 | 3.90           | 6.85                  |
| KFH                    | 0.693       | 0.00  | -0.14 | 1.32  | -5.46  | -7.38  | 1.78 | 17.12 | 2.43           | 10.21                 |
| ZAIN                   | 0.494       | 2.07  | 2.70  | 2.70  | 1.44   | -12.26 | 1.73 | 10.18 | 7.09           | 2.13                  |
| BOUBYAN BANK           | 0.585       | -1.68 | -2.34 | -0.17 | -3.15  | -22.29 | 2.35 | 36.11 | 0.97           | 2.31                  |
| AGILITY                | 0.526       | 0.00  | 0.57  | 0.00  | -5.73  | -26.94 | 0.71 | 19.52 | 0.00           | 1.40                  |
| <b>Saudi Arabia</b>    |             |       |       |       |        |        |      |       |                |                       |
| ARAMCO                 | 33.85       | 0.45  | 1.04  | 1.65  | -3.29  | 16.00  | 5.30 | 17.23 | 4.48           | 8,191.26              |
| SABIC                  | 78.00       | -0.13 | 0.26  | 1.30  | -5.45  | -12.75 | 1.35 | 76.09 | 4.87           | 233.99                |
| STC                    | 37.10       | 0.00  | -2.88 | -3.39 | -1.33  | 1.37   | 2.35 | 13.46 | 4.31           | 185.49                |
| AL-RAJHI BANK          | 71.20       | 1.71  | 0.56  | 6.11  | 4.86   | -5.32  | 2.78 | 16.90 | 2.49           | 284.78                |
| NCB                    | 34.30       | 0.00  | -2.14 | 2.24  | 4.57   | -8.99  | 1.21 | 10.70 | 3.78           | 205.79                |
| <b>Abu Dhabi</b>       |             |       |       |       |        |        |      |       |                |                       |
| ETISALAT.AD            | 19.34       | 0.42  | -1.43 | 4.77  | -5.38  | -15.40 | 4.03 | 17.07 | 4.14           | 168.20                |
| FAB.AD                 | 13.40       | 0.15  | 0.75  | 5.68  | -1.47  | -21.64 | 1.23 | 10.42 | 3.88           | 148.04                |
| EMIRATES NBD           | 17.70       | 0.57  | 0.28  | 4.42  | -0.56  | 36.15  | 1.06 | 5.35  | 3.39           | 111.80                |
| DB ISLAMIC DB          | 5.50        | 0.18  | -0.72 | 1.85  | -5.98  | -3.51  | 0.92 | 6.97  | 5.45           | 39.82                 |
| EMAR.DU                | 6.94        | -2.25 | -2.25 | 3.74  | -13.68 | 18.43  | 0.86 | 7.77  | 3.60           | 61.34                 |
| <b>Qatar</b>           |             |       |       |       |        |        |      |       |                |                       |
| QNB                    | 15.630      | -1.76 | -1.57 | 4.97  | 1.49   | -13.17 | 1.34 | 10.25 | 3.84           | 144.37                |
| INDUSTREIS QAT         | 12.850      | 0.23  | -0.23 | 5.16  | -6.27  | 0.31   | 2.01 | 16.66 | 8.56           | 77.74                 |
| QA ISLAMIC BK          | 18.100      | -0.71 | 0.56  | 4.02  | -2.48  | -2.48  | 1.50 | 10.63 | 3.45           | 42.77                 |
| MASRAF AL RAYA         | 2.530       | 3.22  | 8.68  | 20.48 | 13.50  | -20.21 | 0.96 | 20.01 | 3.95           | 23.53                 |
| MESAIEED PETRO         | 1.593       | 0.06  | -0.44 | 0.19  | -14.12 | -25.11 | 1.19 | 17.48 | 6.91           | 20.01                 |
| <b>Oman</b>            |             |       |       |       |        |        |      |       |                |                       |
| BANK MUSCAT            | 0.269       | 1.13  | 6.32  | 4.26  | -3.24  | -2.18  | 0.88 | 10.19 | 5.58           | 2.02                  |
| OMANTEL                | 1.014       | -0.39 | -0.39 | -1.55 | 2.42   | 10.22  | 1.21 | 32.79 | 3.21           | 0.76                  |
| BANK DHOFAR            | 0.168       | 0.00  | -1.18 | 5.00  | -1.18  | -4.00  | 0.69 | 17.34 | 2.98           | 0.50                  |
| 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               | 0.423       | 3.17  | 5.75  | 3.17  | 7.36   | 0.71   | 0.94 | 6.21  | 3.55           | 0.28                  |

| 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 down today by – 0.09 % The leading sector bottom performance indices today are Industrials – 0.69 % Consumer Discretionary – 0.62 % Banking - 0.36 % respectively

KSA

Saudi Armco has a positive performance today by + 0.45 %, SABIC has a negative performance today by - 0.13 %, STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 1.71 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.42 %, FAB.AD has a positive performance today by + 0.15 %



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