



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 16th 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)	11,081.97	0.54	2.23	3.67	0.24	5.76	3.03	18.27	3.33	11,140.19
Qatar (QE Index)	10,221.48	0.42	2.45	7.33	-0.30	-4.30	1.23	12.16	4.77	540.19
Dubai (DFMGI)	3,994.54	0.25	0.64	3.03	-4.06	19.74	1.45	8.97	4.45	580.10
Abu Dhabi (ADI)	9,575.34	-0.33	0.28	2.48	-2.15	-6.23	2.49	16.56	2.19	2,660.47
Bahrain (BAX)	1,946.52	0.07	0.77	0.89	0.38	2.70	0.77	9.73	5.97	7.12
Muscat SE INDEX	4,619.36	0.78	1.77	1.63	-1.06	-4.90	0.83	9.89	4.78	6.44
SP GCC Comp LMC	174.96	0.02	2.08	4.98	0.12	-2.13	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.08	0.06	1.00	5.26	-3.96	-0.30				

Developed Markets

MSCI World Index	2,985.19	0.41	2.91	7.82	4.62	14.70				
U.S. (S&P 500)	4,514.02	0.13	2.24	7.64	5.27	17.57	4.05	22.91	2.03	39,859.67
U.K. (FTSE 100)	7,504.25	1.26	1.95	2.49	-1.36	0.70	1.57	9.99	3.94	1,993.72
Japan (topix)	2,391.05	0.95	2.33	6.09	2.91	26.40	1.39	14.04	2.27	863,702.76

Emerging Markets

MSCI EM Index	976.52	-0.58	2.97	6.70	2.49	2.11				
China (SSE Composite)	3,054.37	0.11	0.51	1.18	-1.80	-1.13	1.36	12.00		44,025.04
India (Sensex)	65,794.73	-0.28	1.37	3.01	-0.05	8.14	4.25	21.41	1.23	129,060.01

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,642.26	0.13	0.78	1.69	-3.55	-8.91	1.41	14.14	3.40	43.35
Kuwait Premier Index	7,292.17	0.19	0.81	2.09	-3.04	-10.15	1.57	15.70	3.22	34.78
Kuwait Main Index	5,407.27	-0.10	0.69	0.21	-5.42	-3.39	0.99	9.80	4.14	8.57
Kuwait Sector										
Banking	1,598.33	0.16	0.27	1.33	-4.88	-10.90	1.63	15.93	2.86	27.34
Telecom	1,100.15	-0.32	3.74	4.45	2.60	-6.88	1.66	9.93	6.42	3.38
Industrials	910.84	0.14	1.87	2.66	-1.01	-15.58	1.02	14.54	3.08	3.20
Financial Services	1,187.03	0.17	1.11	2.71	-4.15	-5.58	0.95	11.88	4.17	3.78
Real Estate	1,178.15	0.68	1.12	2.24	0.22	-2.53	0.91	14.27	2.12	2.53
Basic Materials	774.97	-0.48	1.75	2.32	-6.98	-10.42	1.35	10.23	10.09	0.44
Health Care	469.74	-0.06	0.52	0.45	-1.13	1.71	1.70	12.07	1.77	0.23
Consumer Staples	599.00	1.04	2.46	2.39	0.51	24.80	1.37	12.68	2.06	0.18
Insurance	2,225.53	-0.49	-0.37	-0.55	0.20	43.51	1.25	8.17	4.19	0.90
Consumer Discretionary	1,425.58	0.21	-1.74	-5.16	-8.45	-4.12				
Energy	942.03	0.15	1.26	4.48	-2.00	-17.26	0.74	10.14	5.39	0.20
Technology	571.09	-0.63	-1.87	-5.42	2.75	-17.97	0.70			0.01
Utilities	465.79	-0.56	1.14	1.73	-4.84	-5.85				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

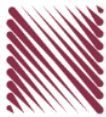
Oil prices fell on Thursday, a day after sinking 5% to a four month-low on growing worries about burgeoning non-OPEC supply and cooling demand, also the Brent contract for January fell to \$77.42 a barrel.

Kuwait Market

The market closed up by 0.13% at 6,642.26 value traded 54.8 million KD, Premier market value reached 39.9 million KD up by 0.19 % at 7,292.17

KSA Market

The market closed up today by + 0.54 % at 11,081.97



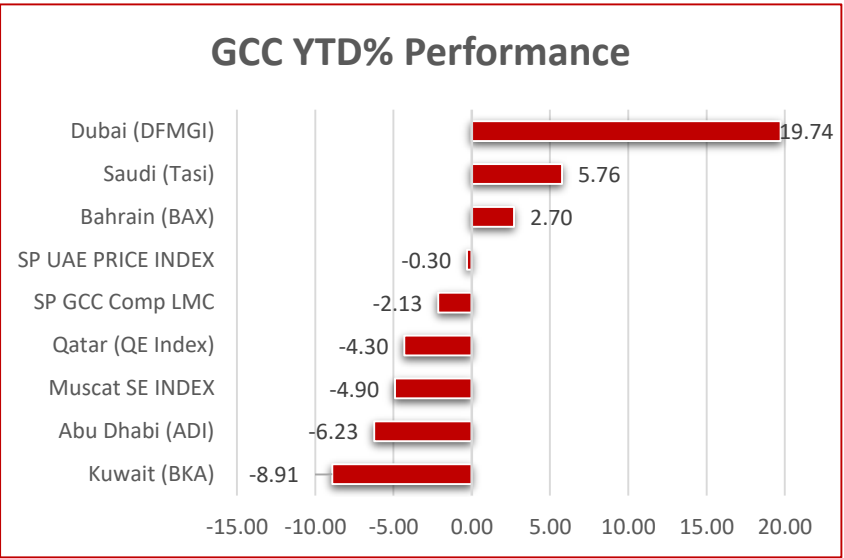
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.878	-0.11	-1.35	0.11	-3.09	-14.48	1.66	12.80	3.85	6.98
KFH	0.704	0.57	1.44	2.92	-3.96	-5.91	1.80	17.39	2.39	10.41
ZAIN	0.505	-0.79	4.99	4.99	3.70	-10.30	1.75	10.10	6.93	2.19
BOUBYAN BANK	0.596	0.85	-0.50	1.71	-1.32	-20.83	2.39	36.79	0.95	2.36
AGILITY	0.544	-0.18	4.02	3.42	-2.51	-24.44	0.78	16.49	0.00	1.46
Saudi Arabia										
ARAMCO	33.65	0.45	0.45	1.05	-3.86	15.31	5.27	17.13	4.50	8,143.52
SABIC	82.10	0.98	5.53	6.62	-0.48	-8.17	1.42	80.09	4.63	246.31
STC	39.20	1.16	2.62	2.08	4.26	7.10	2.48	14.23	4.08	196.01
AL-RAJHI BANK	74.50	0.68	5.23	11.03	9.72	-0.93	2.91	17.68	2.38	298.01
NCB	34.45	-0.29	-1.71	2.68	5.03	-8.59	1.22	10.75	3.77	206.71
Abu Dhabi										
ETISALAT.AD	20.08	0.00	2.34	8.78	-1.76	-12.16	4.18	17.73	3.98	174.63
FAB.AD	13.62	-0.15	2.26	7.26	0.00	-20.47	1.25	10.57	3.82	150.25
EMIRATES NBD	17.95	0.84	2.55	6.78	1.69	39.23	1.09	5.47	3.31	114.33
DB ISLAMIC DB	5.53	-1.08	-1.26	1.30	-6.50	-4.04	0.91	6.94	5.48	39.61
EMAR.DU	7.05	0.28	-0.42	5.68	-12.06	20.65	0.84	6.52	3.54	62.49
Qatar										
QNB	15.830	-0.94	-0.31	6.31	2.79	-12.06	1.36	10.38	3.79	146.25
INDUSTREIS QAT	13.380	1.67	3.88	9.49	-2.41	4.45	2.09	17.34	8.22	80.97
QA ISLAMIC BK	18.790	1.08	4.39	7.99	1.24	1.24	1.55	11.04	3.33	44.41
MASRAF AL RAYA	2.529	-0.59	8.63	20.43	13.46	-20.25	0.96	20.00	3.95	23.53
MESAIEED PETRO	1.620	0.87	1.25	1.89	-12.67	-23.84	1.21	17.77	6.79	20.36
Oman										
BANK MUSCAT	0.272	1.87	7.51	5.43	-2.16	-1.09	0.89	10.31	5.51	2.04
OMANTEL	1.050	2.74	3.14	1.94	6.06	14.13	1.23	29.05	3.10	0.79
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	0.299	0.00	1.70	-1.64	-3.24	3.46	0.73	10.79	2.47	0.49
OMINVEST	0.430	1.65	7.50	4.88	9.14	2.38	0.95	11.77	3.49	0.29

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-November-23	24.27%	14.60%	0.06%	1.99%	0.22%	5.40%	17.54%	12.97%	6.02%	5.12%
15-November-23	24.33%	14.59%	0.06%	1.98%	0.22%	5.40%	17.54%	12.93%	6.05%	5.13%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.13 % The leading sector best performance indices today are Consumer Staples 1.04 % Real Estate 0.68 % Consumer Discretionary 0.21 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.45 %, SABIC has a positive performance today by + 0.98 %, STC has a positive performance today by + 1.16 %, Al Rajhi Bank has a positive performance today by + 0.68 %

U.A.E

ETISALAT .AD has a flat performance today, FAB.AD has a negative performance today by - 0.15 %



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