



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 20th, 2023

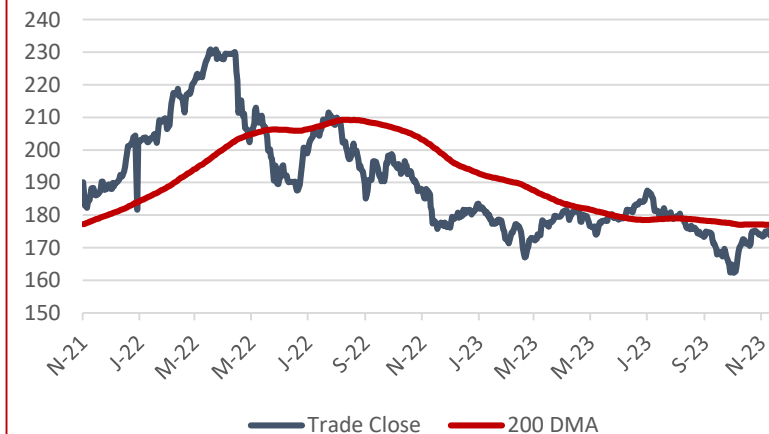




Wednesday, December 20, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,702.90	-0.09	1.39	4.70	5.85	11.69	3.15	18.93	3.10	11,194.99
Qatar (QE Index)	10,204.50	0.61	2.79	1.62	-0.46	-4.46	1.23	12.14	4.78	535.50
Dubai (DFMGI)	4,014.28	0.42	0.33	0.55	-3.59	20.33	1.46	9.02	4.41	577.38
Abu Dhabi (ADI)	9,482.08	-0.12	-0.17	-0.81	-3.10	-7.14	2.47	16.31	2.20	2,636.84
Bahrain (BAX)	1,917.93	0.20	0.14	-1.13	-1.09	1.20	0.75	9.48	6.12	7.00
Muscat SE INDEX	4,592.64	0.47	0.08	-1.41	-1.64	-5.45	0.82	10.43	4.67	6.41
SP GCC Comp LMC	180.55	0.10	1.36	3.20	3.32	0.99	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.83	0.18	0.06	-1.67	-5.53	-1.94				
Developed Markets										
MSCI World Index	3,121.79	-1.00	-0.14	3.25	9.41	19.94				
U.S. (S&P 500)	4,698.35	-1.47	-0.44	2.86	9.57	22.37	4.30	24.08	1.94	42,293.73
U.K. (FTSE 100)	7,715.68	1.02	1.84	3.51	1.41	3.54	1.62	10.23	3.83	2,053.31
Japan (topix)	2,349.38	0.67	0.73	-1.08	1.12	24.19	1.40	13.92	2.31	846,668.45
Emerging Markets										
MSCI EM Index	997.46	-0.11	-0.34	1.05	4.69	4.30				
China (SSE Composite)	2,902.11	-1.03	-1.37	-4.21	-6.70	-6.06	1.36	12.00		44,025.04
India (Sensex)	70,506.31	-1.30	-1.37	5.25	7.11	15.89	4.56	22.95	1.15	137,839.29
Kuwait										
Kuwait All Share Index	6,820.01	0.80	0.80	2.50	-0.97	-6.47	1.43	14.31	3.34	44.05
Kuwait Premier Index	7,503.48	0.98	0.98	2.90	-0.23	-7.54	1.59	15.97	3.17	35.38
Kuwait Main Index	5,505.92	0.15	0.15	0.96	-3.70	-1.62	1.01	9.74	4.08	8.67
Kuwait Sector										
Banking	1,659.66	1.28	1.28	3.97	-1.23	-7.48	1.67	16.30	2.80	27.94
Telecom	1,082.03	0.09	0.09	-0.62	0.91	-8.42	1.64	9.76	6.53	3.32
Industrials	903.83	-0.12	-0.12	-0.27	-1.77	-16.23	1.01	13.98	3.14	3.13
Financial Services	1,215.56	0.12	0.12	1.06	-1.84	-3.32	0.97	11.95	4.08	3.87
Real Estate	1,191.75	0.80	0.80	-0.41	1.38	-1.40	0.92	13.99	2.11	2.54
Basic Materials	747.31	-1.49	-1.49	-7.40	-10.30	-13.62	1.32	10.99	10.30	0.43
Health Care	482.45	0.00	0.00	0.06	1.54	4.46	1.75	12.11	1.72	0.24
Consumer Staples	601.32	-1.75	-1.75	-0.07	0.89	25.29	1.40	12.93	2.01	0.19
Insurance	2,261.58	-0.78	-0.78	2.78	1.82	45.83	1.28	7.94	4.09	0.92
Consumer Discretionary	1,566.20	0.31	0.31	5.14	0.58	5.34				
Energy	980.51	-0.22	-0.22	3.84	2.00	-13.88	0.78	10.52	5.17	0.21
Technology		0.00	0.00	-9.19	-0.39	-20.48	0.68			0.01
Utilities	460.53	0.58	0.58	-1.68	-5.91	-6.91				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell on Wednesday, as concerns over low demand following a surprise U.S. crude inventory build outweighed jitters over global trade disruptions and geopolitical tensions in the Middle East. Brent crude futures fell 65 cents, or 0.8%, to \$79.05 a barrel.

Kuwait Market

The market closed up by + 0.80 % at 6,820.01 value traded 54.4 million KD, Premier market value reached 46.1 million KD up by + 0.98 % at 7,503.48

KSA Market

The market closed down today by - 0.09 % at 11,702.90

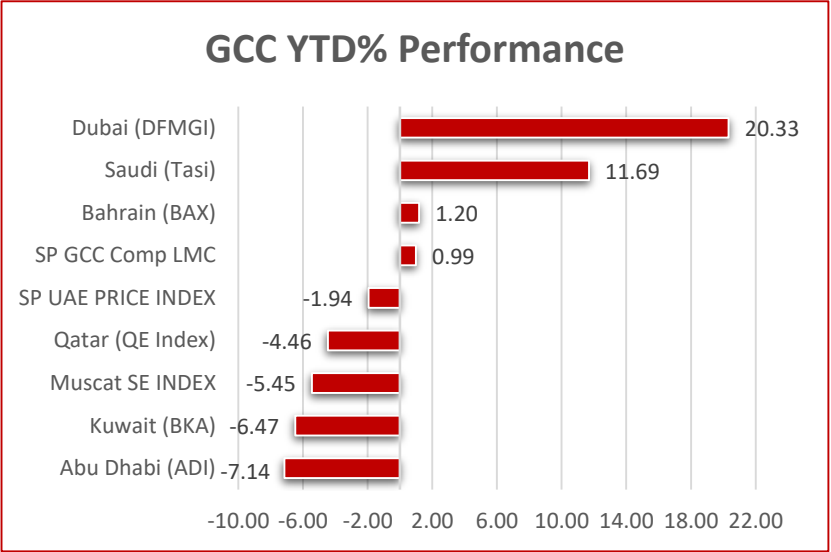


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.919	1.32	1.32	3.84	1.43	-10.49	1.74	13.40	3.68	7.29
KFH	0.729	1.82	1.82	4.29	-0.55	-2.56	1.87	18.00	2.31	10.77
ZAIN	0.492	0.20	0.20	0.61	1.03	-12.61	1.71	9.84	7.11	2.13
BOUBYAN BANK	0.600	0.50	0.50	2.92	-0.66	-20.30	2.41	37.04	0.94	2.38
AGILITY	0.518	-0.19	-0.19	-4.07	-7.17	-28.06	0.74	15.71	0.00	1.39
Saudi Arabia										
ARAMCO	33.10	0.15	0.61	-0.30	-5.43	13.43	5.18	16.85	4.58	8,000.38
SABIC	81.20	-1.93	2.53	2.53	-1.58	-9.17	1.40	79.21	4.19	243.30
STC	39.30	-0.13	0.13	2.21	4.52	7.38	2.48	14.26	4.07	196.26
AL-RAJHI BANK	83.60	-0.12	0.48	9.42	23.12	11.17	3.27	19.84	2.12	333.99
NCB	38.95	0.39	5.84	11.44	18.75	3.34	1.38	12.15	3.33	233.41
Abu Dhabi										
ETISALAT.AD	19.02	-1.86	-2.26	-1.55	-6.95	-16.80	4.04	15.99	4.21	165.41
FAB.AD	13.60	0.74	0.74	-0.87	0.00	-20.47	1.25	10.57	3.82	150.25
EMIRATES NBD	17.20	0.88	0.58	-2.27	-3.37	32.31	1.03	5.20	3.49	108.65
DB ISLAMIC DB	5.68	0.35	-1.22	2.90	-2.91	-0.35	0.95	7.20	5.28	41.13
EMAR.DU	7.75	2.11	3.33	2.11	-3.61	32.25	0.92	7.15	3.23	68.50
Qatar										
QNB	15.620	1.43	3.03	-0.51	1.43	-13.22	1.34	10.24	3.84	144.23
INDUSTREIS QAT	12.660	-0.47	2.01	1.28	-7.66	-1.17	1.98	16.41	8.69	76.57
QA ISLAMIC BK	19.900	1.43	4.79	4.74	7.22	7.22	1.64	11.69	3.14	47.01
MASRAF AL RAYA	2.460	0.41	2.50	-1.05	10.36	-22.42	0.94	19.45	4.07	22.87
MESAIEED PETRO	1.620	0.31	1.25	-3.51	-12.67	-23.84	1.21	17.77	6.79	20.35
Oman										
BANK MUSCAT	0.271	0.37	1.12	-0.37	-2.52	-1.45	0.88	10.27	5.54	2.03
OMANTEL	1.080	1.89	1.89	0.00	9.09	17.39	1.27	29.88	3.01	0.81
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	0.283	-0.35	-0.35	-0.70	-8.41	-2.08	0.69	10.22	2.61	0.46
OMINVEST	0.450	0.00	-2.17	-4.26	14.21	7.14	0.99	12.32	3.33	0.30
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
6-December-23	24.46%	14.87%	0.06%	1.97%	0.19%	5.42%	17.56%	13.15%	6.10%	5.22%
13-December-23	24.47%	15.01%	0.06%	1.98%	0.19%	5.51%	17.58%	13.06%	6.11%	5.27%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.8 %The leading sector best performance indices today are Banking 1.28 % Real estate 0.8 % Utilities 0.58 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC has a negative performance today by - 1.93 %. STC has a negative performance today by -0.13 %, Al Rajhi Bank has a negative performance today by - 0.12 %

U.A.E

ETISALAT .AD has a negative performance today by - 1.86 %, FAB.AD has a positive performance today by + 0.74 %



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