



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

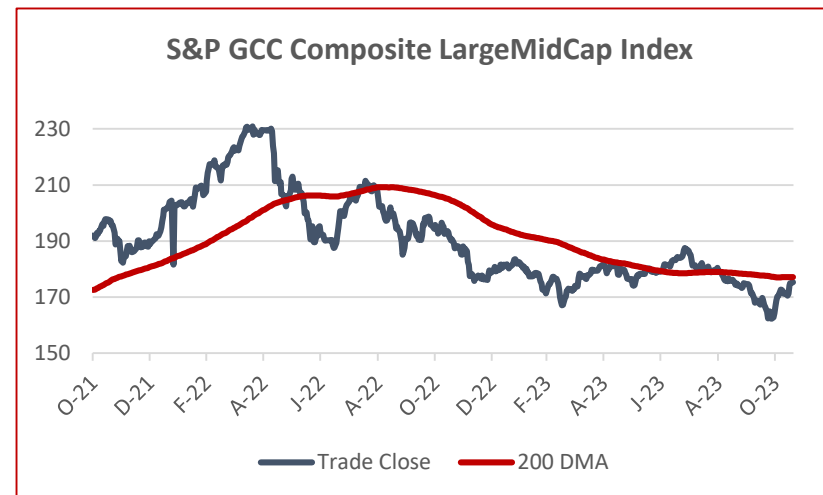
Monday, November 20th 2023





Monday, November 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)	11,118.94	-0.16	0.33	4.01	0.57	6.11	3.04	18.32	3.32	11,103.56
Qatar (QE Index)	10,181.27	-0.58	-0.39	6.91	-0.69	-4.68	1.23	12.11	4.79	537.16
Dubai (DFMGI)	4,002.44	0.20	0.20	3.23	-3.87	19.97	1.45	8.99	4.44	580.99
Abu Dhabi (ADI)	9,575.36	0.00	0.00	2.48	-2.15	-6.23	2.49	16.57	2.18	2,660.95
Bahrain (BAX)	1,945.21	0.06	-0.07	0.83	0.31	2.64	0.77	9.70	5.97	7.10
Muscat SE INDEX	4,614.20	-0.18	-0.11	1.51	-1.17	-5.01	0.83	9.89	4.78	6.45
SP GCC Comp LMC	175.30	-0.24	-0.04	4.93	0.08	-2.17	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.08	0.17	0.17	5.44	-3.79	-0.13				
Developed Markets										
MSCI World Index	3,004.88	0.66	0.66	8.53	5.31	15.45				
U.S. (S&P 500)	4,514.02	0.74	0.74	8.43	6.05	18.44	4.05	22.91	2.03	39,859.67
U.K. (FTSE 100)	7,496.36	-0.11	-0.11	2.39	-1.47	0.60	1.57	9.97	3.95	1,991.64
Japan (topix)	2,372.60	-0.20	-0.97	5.06	1.91	25.17	1.38	13.89	2.28	856,409.89
Emerging Markets										
MSCI EM Index	976.52	0.91	0.91	7.67	3.42	3.04				
China (SSE Composite)	3,068.32	0.46	0.46	1.64	-1.36	-0.68	1.36	12.00		44,025.04
India (Sensex)	65,655.15	-0.21	-0.21	2.79	-0.26	7.91	4.24	21.37	1.23	128,827.38
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,623.72	-0.40	-0.28	1.41	-3.82	-9.17	1.41	14.14	3.40	43.40
Kuwait Premier Index	7,263.00	-0.42	-0.40	1.68	-3.43	-10.51	1.57	15.68	3.22	34.79
Kuwait Main Index	5,416.75	-0.33	0.18	0.39	-5.26	-3.22	0.99	9.83	4.11	8.62
Kuwait Sector										
Banking	1,592.99	-0.47	-0.33	0.99	-5.20	-11.20	1.64	15.95	2.86	27.37
Telecom	1,104.35	0.24	0.38	4.85	2.99	-6.53	1.67	9.94	6.41	3.38
Industrials	906.10	-0.43	-0.52	2.12	-1.52	-16.01	1.01	14.39	3.08	3.20
Financial Services	1,184.94	-0.68	-0.18	2.53	-4.32	-5.75	0.95	11.83	4.15	3.80
Real Estate	1,170.09	-0.82	-0.68	1.54	-0.47	-3.20	0.92	14.35	2.12	2.53
Basic Materials	773.68	-0.45	-0.17	2.15	-7.13	-10.57	1.35	10.26	10.06	0.44
Health Care	469.74	0.00	0.00	0.45	-1.13	1.71	1.70	11.78	1.77	0.23
Consumer Staples	594.21	-0.06	-0.80	1.57	-0.30	23.81	1.36	12.51	2.07	0.18
Insurance	2,224.38	-0.07	-0.05	-0.61	0.14	43.43	1.25	8.15	4.19	0.90
Consumer Discretionary	1,423.76	0.73	-0.13	-5.28	-8.57	-4.24				
Energy	951.36	-0.21	0.99	5.51	-1.03	-16.44	0.75	10.23	5.32	0.20
Technology	574.72	0.00	0.64	-4.82	3.40	-17.45	0.71			0.01
Utilities	460.53	-0.57	-1.13	0.58	-5.91	-6.91				



What Move the GCC markets

Oil Prices

Oil futures nudged higher on Monday, extending gains on expectations of OPEC+ deepening supply cuts to shore up prices, which have fallen for four weeks on easing concern of Mid-East supply disruption brought about by the Israel-Hamas conflict. Brent crude futures climbed to \$82.32 a barrel.

Kuwait Market

The market closed down by - 0.40 % at 6,623.72 value traded 38.2 million KD, Premier market value reached 27.8 million KD down by - 0.42 % at 7,263.0

KSA Market

The market closed down today by - 0.16 % at 11,118.94



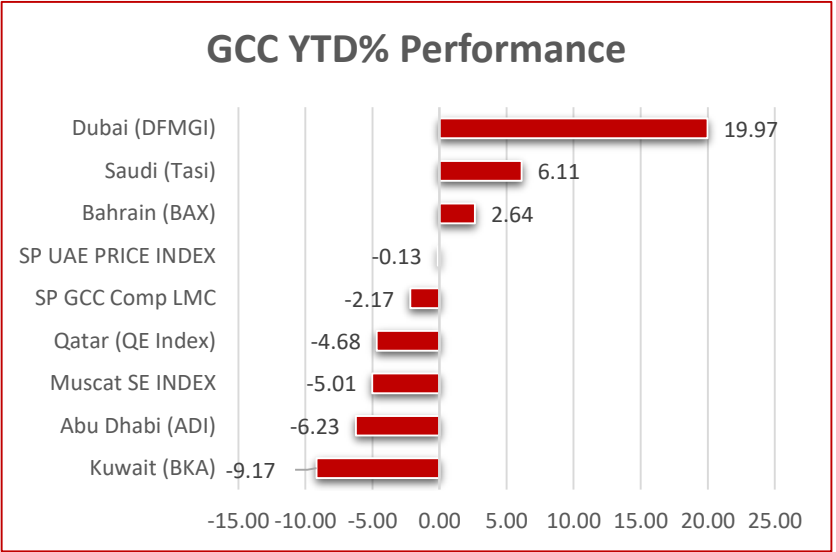
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.870	-0.46	-0.91	-0.80	-3.97	-15.26	1.65	12.68	3.89	6.93
KFH	0.702	-0.57	-0.28	2.63	-4.23	-6.17	1.80	17.34	2.40	10.39
ZAIN	0.506	0.40	0.20	5.20	3.90	-10.12	1.76	10.12	6.92	2.20
BOUBYAN BANK	0.597	-0.83	0.17	1.88	-1.16	-20.70	2.40	36.85	0.95	2.37
AGILITY	0.530	-1.30	-2.57	0.76	-5.02	-26.39	0.76	16.07	0.00	1.42
Saudi Arabia										
ARAMCO	33.45	-0.89	-0.59	0.45	-4.43	14.63	5.24	17.03	4.53	8,095.33
SABIC	81.60	-1.69	-0.61	5.97	-1.09	-8.72	1.41	79.60	4.66	244.81
STC	38.65	-1.02	-1.40	0.65	2.79	5.60	2.44	14.03	4.14	193.26
AL-RAJHI BANK	75.00	0.13	0.67	11.77	10.46	-0.27	2.93	17.80	2.37	300.02
NCB	34.75	-0.57	0.87	3.58	5.95	-7.80	1.23	10.84	3.73	208.51
Abu Dhabi										
ETISALAT.AD	20.10	0.10	0.10	8.88	-1.66	-12.07	4.19	17.74	3.98	173.94
FAB.AD	13.62	0.15	0.15	7.41	0.15	-20.35	1.25	10.59	3.82	149.58
EMIRATES NBD	18.05	-0.28	-0.28	6.49	1.40	38.85	1.08	5.46	3.32	114.33
DB ISLAMIC DB	5.53	1.10	1.10	2.41	-5.47	-2.98	0.92	7.01	5.42	39.68
EMAR.DU	7.12	0.71	0.71	6.43	-11.44	21.50	0.85	6.57	3.51	62.76
Qatar										
QNB	15.810	-1.06	-0.13	6.18	2.66	-12.17	1.36	10.37	3.80	146.49
INDUSTREIS QAT	13.090	-1.43	-2.17	7.12	-4.52	2.19	2.05	16.97	8.40	79.50
QA ISLAMIC BK	18.940	-0.05	0.80	8.85	2.05	2.05	1.57	11.13	3.30	44.75
MASRAF AL RAYA	2.540	0.00	0.43	20.95	13.95	-19.90	0.97	20.09	3.94	23.57
MESAIEED PETRO	1.616	-0.06	-0.25	1.64	-12.88	-24.02	1.20	17.73	6.81	20.30
Oman										
BANK MUSCAT	0.275	1.10	1.10	6.59	-1.08	0.00	0.90	10.42	5.45	2.06
OMANTEL	1.035	-1.33	-1.43	0.49	4.55	12.50	1.21	28.63	3.14	0.78
BANK DHOFAR	0.168	0.00	0.00	5.00	-1.18	-4.00	0.69	17.34	2.98	0.50
NAT BANK OF OMAN	0.296	-1.00	-1.00	-2.63	-4.21	2.42	0.72	10.69	2.50	0.48
OMINVEST	0.430	0.00	0.00	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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by - 0.40 %The leading sector bottom performance indices today are Real Estate - 0.82 % Financial Services - 0.68 % Utilities - 0.57 % respectively.

KSA

Saudi Armco has a negative performance today by - 0.89 %, SABIC has a negative performance today by - 1.69 %. STC has a negative performance today by -1.02 %, Al Rajhi Bank has a positive performance today by + 0.13 %

U.A.E

ETISALAT.AD has a positive performance today + 0.10 %, FAB.AD has a positive performance today + 0.15 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw