

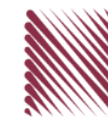


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 21th, 2023



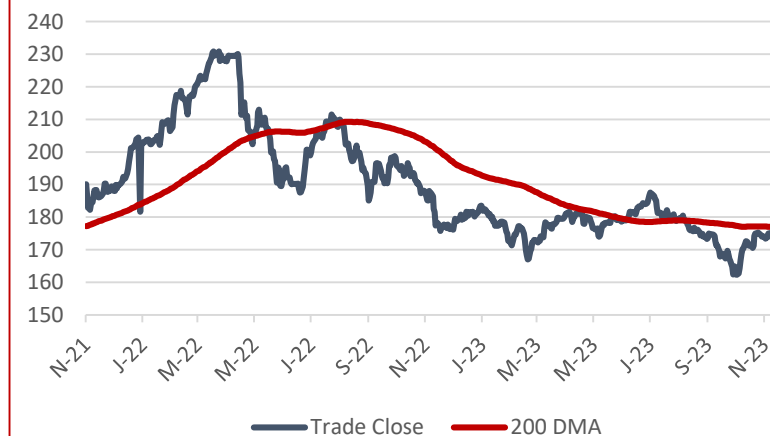


Thursday, December 21, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,621.93	-0.69	0.68	3.98	5.12	10.91	3.13	18.82	3.11	11,152.65
Qatar (QE Index)	10,285.30	0.79	3.60	2.43	0.33	-3.71	1.24	12.24	4.74	539.52
Dubai (DFMGI)	4,022.92	0.44	0.55	0.77	-3.38	20.59	1.46	9.05	4.40	577.79
Abu Dhabi (ADI)	9,489.80	-0.04	-0.08	-0.73	-3.02	-7.06	2.47	16.34	2.20	2,623.35
Bahrain (BAX)	1,917.93	0.00	0.14	-1.13	-1.09	1.20	0.75	9.47	6.12	7.00
Muscat SE INDEX	4,561.64	-0.68	-0.59	-2.07	-2.30	-6.09	0.81	10.36	4.70	6.36
SP GCC Comp LMC	180.04	0.12	1.08	2.91	3.03	0.71	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.55	0.54	0.60	-1.14	-5.03	-1.41				
Developed Markets										
MSCI World Index	3,152.26	0.23	0.84	4.25	10.48	21.12				
U.S. (S&P 500)	4,754.63	0.17	0.75	4.09	10.88	23.83	4.28	24.00	1.95	42,177.09
U.K. (FTSE 100)	7,697.51	0.04	1.60	3.27	1.18	3.30	1.62	10.21	3.84	2,048.06
Japan (topix)	2,336.43	0.45	0.18	-1.62	0.56	23.51	1.39	13.85	2.32	841,070.67
Emerging Markets										
MSCI EM Index	992.28	-0.60	-0.86	0.52	4.15	3.75				
China (SSE Composite)	2,914.78	-0.13	-0.94	-3.79	-6.29	-5.65	1.36	12.00		44,025.04
India (Sensex)	71,106.96	0.34	-0.53	6.15	8.02	16.87	4.60	23.14	1.14	139,226.85

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,830.82	0.16	0.96	2.66	-0.81	-6.33	1.45	14.44	3.32	44.44
Kuwait Premier Index	7,491.20	-0.16	0.81	2.74	-0.39	-7.69	1.61	16.09	3.15	35.63
Kuwait Main Index	5,582.63	1.39	1.54	2.37	-2.36	-0.25	1.02	9.89	4.02	8.81
Kuwait Sector										
Banking	1,661.54	0.11	1.40	4.08	-1.12	-7.38	1.69	16.50	2.76	28.29
Telecom	1,090.87	0.82	0.90	0.19	1.73	-7.67	1.65	9.84	6.47	3.35
Industrials	902.97	-0.10	-0.21	-0.37	-1.86	-16.30	1.01	13.95	3.15	3.13
Financial Services	1,214.45	-0.09	0.03	0.96	-1.93	-3.40	0.97	11.93	4.08	3.87
Real Estate	1,189.17	-0.22	0.58	-0.63	1.16	-1.62	0.92	14.07	2.10	2.55
Basic Materials	742.58	-0.63	-2.12	-7.98	-10.86	-14.16	1.29	10.75	10.53	0.42
Health Care	482.45	0.00	0.00	0.06	1.54	4.46	1.75	12.11	1.72	0.24
Consumer Staples	650.05	8.10	6.21	8.02	9.07	35.44	1.49	13.84	1.90	0.20
Insurance	2,294.33	1.45	0.65	4.27	3.29	47.94	1.29	8.00	4.07	0.92
Consumer Discretionary	1,563.19	-0.19	0.11	4.94	0.39	5.14				
Energy	974.06	-0.66	-0.88	3.16	1.33	-14.45	0.77	10.42	5.21	0.20
Technology	565.27	2.10	2.10	-7.28	1.70	-18.81	0.70			0.01
Utilities	457.89	-0.57	0.00	-2.25	-6.45	-7.45				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

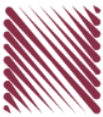
Oil prices fell on Thursday, as concerns over low demand following a surprise U.S. crude inventory build outweighed jitters over global trade disruptions and geopolitical tensions in the Middle East. Brent crude futures fell 65 cents, or 0.8%, to \$79.05 a barrel

Kuwait Market

The market closed up by + 0.16 % at 6,830.82 value traded 36.2 million KD, Premier market value reached 28.7 million KD down by - 0.16 % at 7,491.20

KSA Market

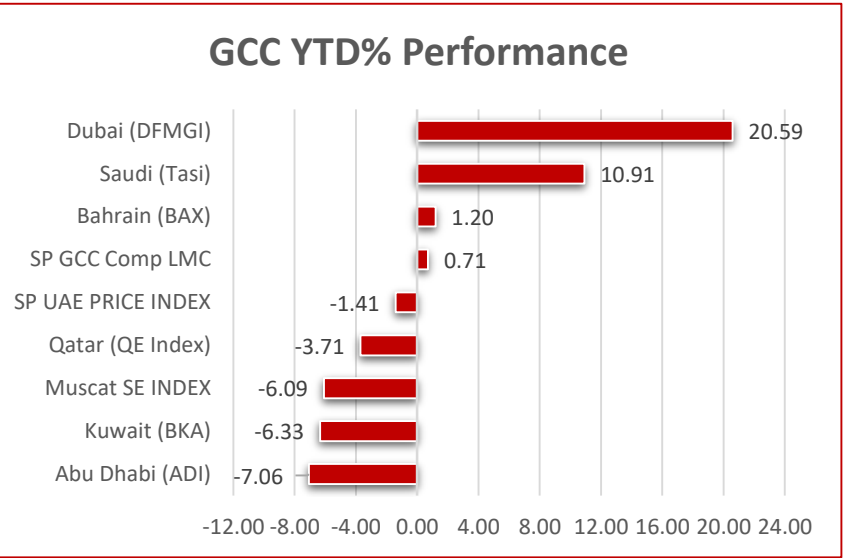
The market closed down today by - 0.69 % at 11,621.93



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	0.00	1.32	3.84	1.43	-10.49	1.74	13.40	3.68	7.28
KFH	0.726	-0.41	1.40	3.86	-0.95	-2.96	1.86	17.93	2.32	10.73
ZAIN	0.495	0.61	0.81	1.23	1.64	-12.08	1.72	9.90	7.07	2.15
BOUBYAN BANK	0.599	-0.17	0.34	2.74	-0.83	-20.43	2.41	36.98	0.94	2.38
AGILITY	0.518	0.00	-0.19	-4.07	-7.17	-28.06	0.74	15.71	0.00	1.39
Saudi Arabia										
ARAMCO	33.00	-0.30	0.30	-0.60	-5.71	13.08	5.17	16.80	4.59	7,986.00
SABIC	81.20	0.00	2.53	2.53	-1.58	-9.17	1.40	79.21	4.19	243.60
STC	39.20	-0.25	-0.13	1.95	4.26	7.10	2.48	14.23	4.08	196.00
AL-RAJHI BANK	82.50	-1.32	-0.84	7.98	21.50	9.71	3.23	19.58	2.15	330.00
NCB	38.10	-2.18	3.53	9.01	16.16	1.09	1.35	11.89	3.41	228.60
Abu Dhabi										
ETISALAT.AD	19.20	1.25	-0.10	0.62	-4.89	-14.96	4.13	16.34	4.12	169.07
FAB.AD	13.68	0.44	1.78	0.15	1.03	-19.65	1.26	10.68	3.78	151.79
EMIRATES NBD	17.10	1.18	0.00	-2.84	-3.93	31.54	1.03	5.17	3.51	108.01
DB ISLAMIC DB	5.70	0.18	-0.87	3.26	-2.56	0.00	0.95	7.23	5.26	41.27
EMAR.DU	7.76	0.26	3.47	2.24	-3.48	32.42	0.92	7.16	3.22	68.59
Qatar										
QNB	15.840	1.41	4.49	0.89	2.86	-12.00	1.36	10.39	3.79	146.21
INDUSTREIS QAT	12.610	-0.39	1.61	0.88	-8.02	-1.56	1.97	16.35	8.72	75.93
QA ISLAMIC BK	20.230	1.66	6.53	6.47	9.00	9.00	1.67	11.88	3.09	47.80
MASRAF AL RAYA	2.470	0.41	2.92	-0.64	10.81	-22.11	0.94	19.53	4.05	23.03
MESAIEED PETRO	1.630	0.62	1.87	-2.92	-12.13	-23.37	1.21	17.88	6.75	20.50
Oman										
BANK MUSCAT	0.269	-0.74	0.37	-1.10	-3.24	-2.18	0.88	10.19	5.58	2.00
OMANTEL	1.060	-1.85	0.00	-1.85	7.07	15.22	1.24	29.32	3.07	0.80
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	0.282	-0.35	-0.70	-1.05	-8.74	-2.42	0.69	10.18	2.62	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
13-December-23	24.47%	15.01%	0.06%	1.98%	0.19%	5.51%	17.58%	13.06%	6.11%	5.27%
20-December-23	24.45%	14.99%	0.06%	1.99%	0.19%	5.53%	17.58%	12.88%	6.11%	5.36%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.16 % The leading sector best performance indices today are Consumer Staples 8.10 % Technology 2.10 % Insurance 1.45 % respectively

KSA
Saudi Armco has a negative performance today by + 0.30 %, SABIC has a flat performance today. STC has a negative performance today by - 0.25 %, Al Rajhi Bank has a negative performance today by – 1.32 %

U.A.E
ETISALAT .AD has a positive performance today by + 1.25 %, FAB.AD has a positive performance today by + 0.44 %



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