

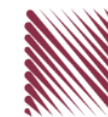


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, November 21th 2023

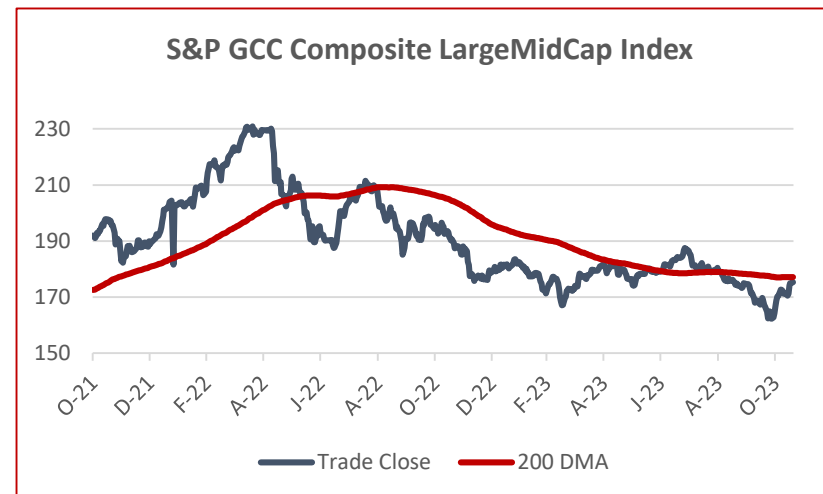




Tuesday, November 21, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,129.10	0.09	0.43	4.11	0.66	6.21	3.03	18.31	3.32	11,101.68
Qatar (QE Index)	10,226.44	0.44	0.05	7.38	-0.25	-4.26	1.23	12.17	4.77	538.63
Dubai (DFMGI)	3,985.04	-0.43	-0.24	2.78	-4.29	19.45	1.45	8.97	4.45	578.41
Abu Dhabi (ADI)	9,541.76	-0.35	-0.35	2.12	-2.49	-6.55	2.48	16.51	2.19	2,656.91
Bahrain (BAX)	1,945.70	0.02	-0.04	0.85	0.34	2.66	0.77	9.71	5.97	7.11
Muscat SE INDEX	4,620.64	0.14	0.03	1.65	-1.04	-4.88	0.83	9.93	4.76	6.47
SP GCC Comp LMC	174.89	-0.05	-0.09	4.88	0.03	-2.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.31	-0.63	-0.46	4.78	-4.40	-0.76				
Developed Markets										
MSCI World Index	3,004.88	-0.17	0.49	8.35	5.14	15.26				
U.S. (S&P 500)	4,547.38	-0.20	0.54	8.21	5.83	18.20	4.07	23.03	2.03	40,075.97
U.K. (FTSE 100)	7,481.99	-0.19	-0.30	2.19	-1.66	0.41	1.57	9.96	3.95	1,988.08
Japan (topix)	2,367.79	0.44	-0.54	5.52	2.36	25.72	1.38	13.83	2.28	854,887.01
Emerging Markets										
MSCI EM Index	985.41	0.31	1.22	8.01	3.75	3.36				
China (SSE Composite)	3,067.93	-0.79	-0.35	0.82	-2.15	-1.48	1.36	12.00		44,025.04
India (Sensex)	65,930.77	0.42	0.21	3.22	0.16	8.37	4.26	21.45	1.23	129,334.19

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,651.10	0.41	0.13	1.83	-3.42	-8.79	1.41	14.09	3.40	43.41
Kuwait Premier Index	7,292.08	0.40	0.00	2.09	-3.04	-10.15	1.57	15.67	3.22	34.78
Kuwait Main Index	5,441.76	0.46	0.64	0.85	-4.82	-2.77	1.00	9.72	4.11	8.63
Kuwait Sector										
Banking	1,596.93	0.25	-0.09	1.24	-4.96	-10.98	1.63	15.92	2.86	27.32
Telecom	1,106.58	0.20	0.58	5.06	3.20	-6.34	1.67	9.99	6.38	3.40
Industrials	909.60	0.39	-0.14	2.52	-1.14	-15.69	1.01	14.19	3.08	3.20
Financial Services	1,198.60	1.15	0.97	3.72	-3.21	-4.66	0.96	11.87	4.13	3.82
Real Estate	1,181.87	1.01	0.32	2.57	0.54	-2.22	0.92	14.10	2.11	2.54
Basic Materials	778.64	0.64	0.47	2.80	-6.53	-10.00	1.36	10.28	10.04	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	597.93	0.63	-0.18	2.21	0.33	24.58	1.37	12.61	2.06	0.18
Insurance	2,227.84	0.16	0.10	-0.45	0.30	43.66	1.26	7.90	4.19	0.90
Consumer Discretionary	1,442.68	1.33	1.20	-4.02	-7.35	-2.97				
Energy	952.52	0.12	1.11	5.64	-0.91	-16.34	0.75	10.20	5.33	0.20
Technology	560.17	-2.53	-1.91	-7.23	0.78	-19.54	0.69			0.01
Utilities	460.53	0.00	-1.13	0.58	-5.91	-6.91				



What Move the GCC markets

Oil Prices

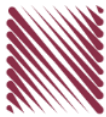
Oil futures eased on Tuesday, reversing the previous day's rally, as concerns over weaker demand amid a slowing global economy outweighed the prospect of deepening supply cuts by OPEC and its allies such as Russia. Brent crude futures fell 19 cents, or 0.2%, to \$82.13 a barrel.

Kuwait Market

The market closed up by + 0.41 % at 6,651.10 value traded 53.9 million KD, Premier market value reached 34.4 million KD up by + 0.40 % at 7,292.08

KSA Market

The market closed up today by + 0.09 % at 11,129.10

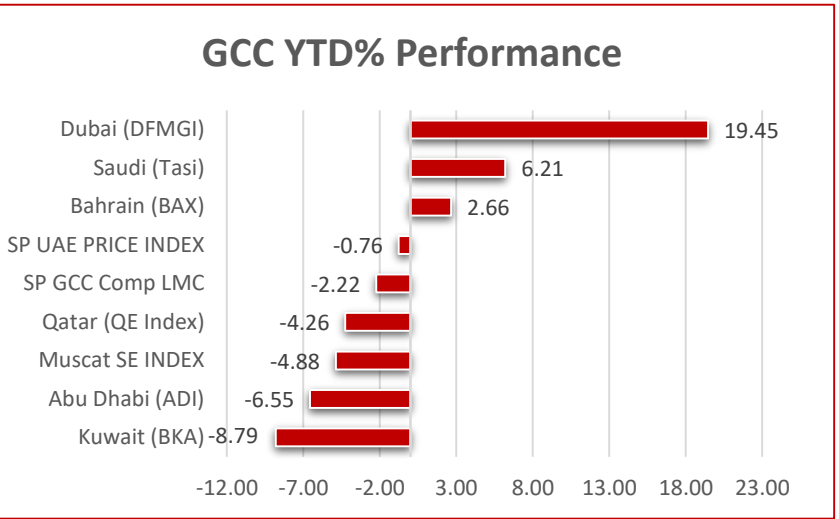


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.873	0.34	-0.57	-0.46	-3.64	-14.97	1.65	12.73	3.87	6.92
KFH	0.702	0.00	-0.28	2.63	-4.23	-6.17	1.80	17.34	2.40	10.34
ZAIN	0.507	0.20	0.40	5.41	4.11	-9.95	1.76	10.14	6.90	2.20
BOUBYAN BANK	0.599	0.34	0.50	2.22	-0.83	-20.43	2.41	36.98	0.94	2.38
AGILITY	0.534	0.75	-1.84	1.52	-4.30	-25.83	0.77	16.19	0.00	1.43
Saudi Arabia										
ARAMCO	33.45	0.00	-0.59	0.45	-4.43	14.63	5.24	17.03	4.53	8,095.12
SABIC	80.50	-1.35	-1.95	4.55	-2.42	-9.96	1.39	78.53	4.72	241.51
STC	38.30	-0.91	-2.30	-0.26	1.86	4.64	2.42	13.90	4.18	191.51
AL-RAJHI BANK	75.50	0.67	1.34	12.52	11.19	0.40	2.95	17.92	2.35	302.01
NCB	34.90	0.43	1.31	4.02	6.40	-7.40	1.23	10.89	3.72	209.41
Abu Dhabi										
ETISALAT.AD	19.70	-1.99	-1.89	6.72	-3.62	-13.82	4.10	17.39	4.06	171.15
FAB.AD	13.56	-0.44	-0.29	6.94	-0.29	-20.70	1.25	10.54	3.83	149.14
EMIRATES NBD	17.95	-0.55	-0.83	5.90	0.84	38.08	1.08	5.43	3.34	113.07
DB ISLAMIC DB	5.55	0.36	1.46	2.78	-5.13	-2.63	0.93	7.04	5.41	40.04
EMAR.DU	7.07	-0.70	0.00	5.68	-12.06	20.65	0.84	6.52	3.54	62.49
Qatar										
QNB	15.820	0.06	-0.06	6.25	2.73	-12.11	1.36	10.37	3.79	144.64
INDUSTREIS QAT	13.330	1.83	-0.37	9.08	-2.77	4.06	2.09	17.28	8.25	80.47
QA ISLAMIC BK	18.900	-0.21	0.59	8.62	1.83	1.83	1.56	11.10	3.31	44.56
MASRAF AL RAYA	2.556	0.63	1.07	21.71	14.67	-19.39	0.97	20.21	3.91	23.52
MESAIEED PETRO	1.620	0.25	0.00	1.89	-12.67	-23.84	1.21	17.77	6.79	20.34
Oman										
BANK MUSCAT	0.277	0.73	1.84	7.36	-0.36	0.73	0.90	10.50	5.42	2.08
OMANTEL	1.050	1.45	0.00	1.94	6.06	14.13	1.23	29.05	3.10	0.79
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	0.00	-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

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.41 %The leading sector top performance indices today are Consumer Discretionary + 1.33 % Financial Services + 1.15 % Real Estate + 1.01 % respectively.

KSA

Saudi Armco has a flat performance today , SABIC has a negative performance today by - 1.35 %. STC has a negative performance today by - 0.91 % , Al Rajhi Bank has a positive performance today by + 0.67 %

U.A.E

ETISALAT.AD has a negative performance today - 1.99 % , FAB.AD has a negative performance today - 0.44 %



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