

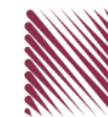


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 23rd, 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)	11,078.08	-0.20	-0.04	3.63	0.20	5.72	3.03	18.27	3.34	11,088.05
Qatar (QE Index)	10,208.50	-0.14	-0.13	7.19	-0.42	-4.42	1.23	12.15	4.78	538.22
Dubai (DFMGI)	3,992.00	0.18	-0.06	2.96	-4.12	19.66	1.45	8.97	4.44	580.35
Abu Dhabi (ADI)	9,555.23	0.23	-0.21	2.26	-2.35	-6.42	2.49	16.45	2.19	2,663.93
Bahrain (BAX)	1,951.73	0.20	0.27	1.16	0.65	2.98	0.77	9.73	5.95	7.11
Muscat SE INDEX	4,620.64	0.14	0.03	1.65	-1.04	-4.88	0.83	9.92	4.76	6.47
SP GCC Comp LMC	174.12	0.08	-0.48	4.47	-0.36	-2.61	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.81	0.42	-0.20	5.05	-4.15	-0.50				

Developed Markets

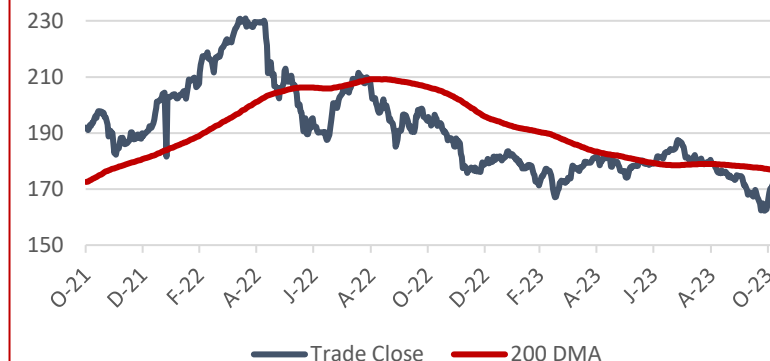
MSCI World Index	3,015.19	0.21	1.00	8.91	5.68	15.85				
U.S. (S&P 500)	4,559.34	0.06	1.00	8.72	6.33	18.75	4.09	23.02	2.02	40,262.78
U.K. (FTSE 100)	7,488.20	0.06	-0.21	2.27	-1.58	0.49	1.57	9.97	3.95	1,989.77
Japan (topix)	2,390.94	0.54	0.00	6.09	2.91	26.39	1.39	13.98	2.26	863,536.44

Emerging Markets

MSCI EM Index	980.33	-0.78	0.39	7.12	2.89	2.50				
China (SSE Composite)	3,040.97	-0.68	-0.44	0.74	-2.23	-1.56	1.36	12.00		44,025.04
India (Sensex)	65,970.04	-0.07	0.27	3.28	0.22	8.43	4.26	21.47	1.23	129,201.65

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,664.26	0.06	0.33	2.03	-3.23	-8.61	1.41	14.11	3.39	43.49
Kuwait Premier Index	7,309.44	0.10	0.24	2.33	-2.81	-9.93	1.57	15.71	3.22	34.86
Kuwait Main Index	5,444.36	-0.08	0.69	0.90	-4.78	-2.72	1.00	9.72	4.11	8.63
Kuwait Sector										
Banking	1,598.06	-0.11	-0.02	1.31	-4.90	-10.92	1.63	15.93	2.86	27.33
Telecom	1,094.76	0.02	-0.49	3.94	2.10	-7.34	1.66	9.88	6.45	3.36
Industrials	913.04	0.10	0.24	2.91	-0.77	-15.37	1.01	14.22	3.07	3.21
Financial Services	1,215.77	1.25	2.42	5.20	-1.83	-3.30	0.97	12.12	4.07	3.87
Real Estate	1,189.13	0.05	0.93	3.20	1.15	-1.62	0.92	14.04	2.10	2.55
Basic Materials	770.47	-0.31	-0.58	1.72	-7.52	-10.94	1.34	10.17	10.15	0.43
Health Care	469.74	0.00	0.00	0.45	-1.13	1.71	1.70	11.78	1.77	0.23
Consumer Staples	593.53	-1.24	-0.91	1.46	-0.41	23.66	1.36	12.54	2.08	0.18
Insurance	2,236.37	-0.10	0.49	-0.07	0.68	44.21	1.26	7.93	4.17	0.90
Consumer Discretionary	1,467.76	0.32	2.96	-2.36	-5.74	-1.28				
Energy	958.60	0.17	1.76	6.31	-0.28	-15.80	0.76	10.25	5.30	0.20
Technology	609.64	0.00	6.75	0.96	9.68	-12.44	0.75			0.01
Utilities	463.16	0.00	-0.56	1.15	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell slightly Friday as traders speculated on whether OPEC+ would come to an agreement on further production cuts. Brent crude futures dropped 36 cents, or 0.44%, to \$81.06 a barrel.

Kuwait Market

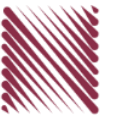
The market closed up by + 0.06 % at 6,664.26 value traded 51.7 million KD, Premier market value reached 30.5 million KD up by + 0.10 % at 7,309.44

KSA Market

The market closed down today by - 0.20 % at 11,078.26

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



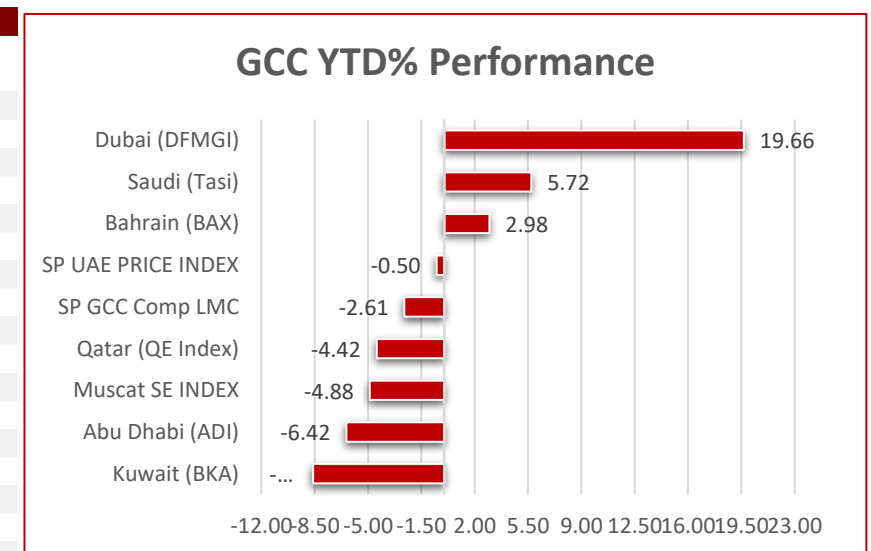
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.879	0.34	0.11	0.23	-2.98	-14.38	6.97 KWD	1.66	27.00
KFH	0.701	-0.14	-0.43	2.49	-4.37	-6.31	10.35 KWD	1.80	32.00
Zain	0.499	0.00	-1.19	3.74	2.46	-11.37	2.16 KWD	1.73	9.98
BOUBYAN BANK	0.598	-0.50	0.34	2.05	-0.99	-20.57	2.37 KWD	2.40	34.00
Agility	0.535	-0.37	-1.65	1.71	-4.12	-25.69	1.43 KWD	0.77	16.22
Saudi Arabia									
ARAMCO	33.40	-0.15	-0.74	0.30	-4.57	14.45	8,082.80 SAR	5.23	17.42
SABIC	80.90	-0.49	-1.46	5.06	-1.94	-9.51	242.70 SAR	1.40	35.00
STC	38.15	-0.39	-2.68	-0.65	1.46	4.23	190.75 SAR	2.41	13.87
AL-RAJHI BANK	75.00	-0.53	0.67	11.77	10.46	-0.27	300.00 SAR	2.93	17.89
NCB	34.35	0.59	-0.29	2.38	4.73	-8.86	206.10 SAR	1.21	10.66
United Arab Emirates									
ETISALAT.AD	19.52	-0.91	-2.79	5.74	-4.50	-14.61	206.60 AED	5.10	21.10
FAB.AD	13.48	0.75	-1.03	6.31	-0.88	-21.17	150.25 AED	1.25	10.48
EMIRATES NBD	17.90	0.00	-0.28	5.60	0.56	37.69	114.02 AED	1.08	5.41
DB ISLAMIC BK	5.51	-0.90	-0.36	2.04	-5.81	-3.33	40.04 AED	0.92	6.99
EMAAR PROPERT	7.13	0.71	1.13	6.58	-11.32	21.67	62.58 AED	0.84	6.58
Qatar									
QNB	15.80	0.06	-0.19	6.11	2.60	-12.22	146.21 QAR	1.36	10.36
INDUSTRIES QAT	13.26	-0.97	-0.90	8.51	-3.28	3.51	80.37 QAR	2.08	15.85
QA ISLAMIC BK	18.92	-0.26	0.69	8.74	1.94	1.94	44.79 QAR	1.56	11.11
MASRAF AL RAYA	2.53	0.04	0.20	20.67	13.68	-20.09	23.61 QAR	0.97	20.03
MESAIEED PETRO	1.62	-0.06	-0.12	1.76	-12.78	-23.93	20.37 QAR	1.20	17.76
OMAN									
BANK MUSCAT	0.277	0.00	1.84	7.36	-0.36	0.73	2.08 OMR	0.90	8.33
OMANTEL	1.050	18.24	0.00	1.94	6.06	14.13	0.79 OMR	1.23	7.69
BANK DHOFAR	0.168	0.00	0.00	5.00	-1.18	-4.00	0.50 QAR	0.69	14.93
NAT BANK OF OMAN	0.296	0.00	-1.33	-2.63	-1.33	2.42	0.48 QAR	0.72	12.71
OMINVEST	0.430	0.00	0.00	4.88	9.14	2.38	0.29 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-November-23	24.33%	14.59%	0.06%	1.98%	0.22%	5.40%	17.54%	12.93%	6.05%	5.13%
22-November-23	24.38%	14.72%	0.06%	1.97%	0.22%	5.38%	17.56%	13.14%	6.07%	5.17%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.06 %The leading sector best performance indices today are Financial services 1.25 % Consumer Disc 0.32 % Energy 0.17 % respectively

KSA

Saudi Armco have negative performance today by -0.15 %, SABIC have negative performance today by -0.49%. STC have negative performance today by -0.39 %, Al Rajhi Bank have negative performance today by -0.53 %

U.A.E

ETISALAT .AD have negative performance today by -0.91 %, FAB.AD has a positive performance today by + 0.75 %



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