

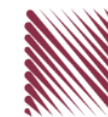


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, December 24<sup>th</sup>, 2023

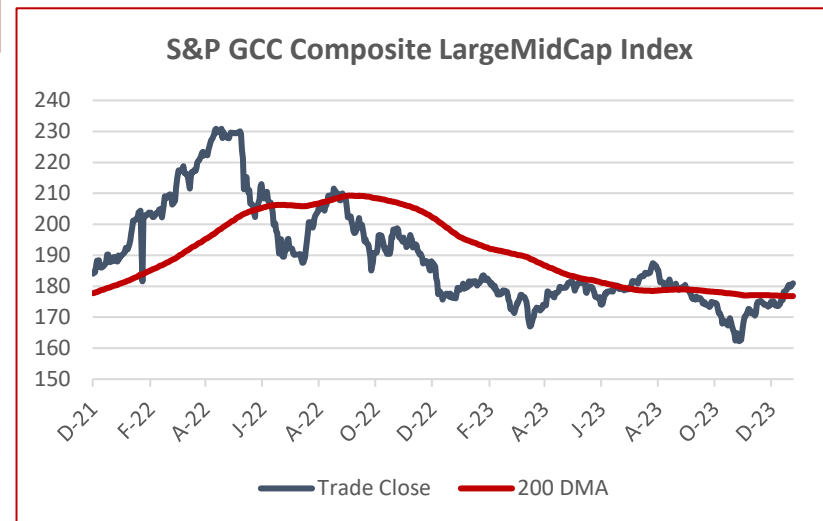




Sunday, December 24, 2023

| Market Watch             | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)             | 11,621.93   | 0.59  | 0.59  | 4.59  | 5.74  | 11.57 | 3.16 | 19.00 | 3.09           | 11,174.25             |
| Qatar (QE Index)         | 10,285.30   | 1.11  | 1.11  | 3.57  | 1.44  | -2.63 | 1.25 | 12.38 | 4.69           | 544.10                |
| 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    | 0.22  | 0.22  | -0.91 | -0.88 | 1.42  | 0.75 | 9.50  | 6.10           | 7.01                  |
| Muscat SE INDEX          | 4,561.64    | 0.12  | 0.12  | -1.95 | -2.18 | -5.98 | 0.81 | 10.38 | 4.70           | 6.36                  |
| SP GCC Comp LMC          | 180.04      | 0.49  | 0.49  | 3.41  | 3.53  | 1.20  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 135.55      | 0.00  | 0.00  | -1.14 | -5.03 | -1.41 |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| 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           | 2,048.01              |
| Japan (topix)            | 2,336.43    | 0.45  | 0.18  | -1.62 | 0.56  | 23.51 | 1.39 | 13.85 | 2.32           | 841,070.67            |
| <b>Emerging Markets</b>  |             |       |       |       |       |       |      |       |                |                       |
| 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) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| Kuwait All Share Index | 6,830.82    | -0.36 | -0.36 | 2.29  | -1.17  | -6.66  | 1.45 | 14.44 | 3.32           | 44.44                 |
| Kuwait Premier Index   | 7,491.20    | -0.16 | -0.16 | 2.57  | -0.55  | -7.84  | 1.61 | 16.09 | 3.15           | 35.63                 |
| Kuwait Main Index      | 5,582.63    | -1.10 | -1.10 | 1.24  | -3.43  | -1.35  | 1.02 | 9.89  | 4.02           | 8.81                  |
| <b>Kuwait Sector</b>   |             |       |       |       |        |        |      |       |                |                       |
| Banking                | 1,661.54    | -0.48 | -0.48 | 3.59  | -1.59  | -7.82  | 1.69 | 16.50 | 2.76           | 28.29                 |
| Telecom                | 1,090.87    | -0.20 | -0.20 | -0.01 | 1.52   | -7.86  | 1.65 | 9.84  | 6.47           | 3.35                  |
| Industrials            | 902.97      | -0.24 | -0.24 | -0.61 | -2.10  | -16.51 | 1.01 | 13.95 | 3.15           | 3.13                  |
| Financial Services     | 1,214.45    | -0.05 | -0.05 | 0.91  | -1.98  | -3.46  | 0.97 | 11.93 | 4.08           | 3.87                  |
| Real Estate            | 1,189.17    | 0.04  | 0.04  | -0.59 | 1.20   | -1.58  | 0.92 | 14.07 | 2.10           | 2.55                  |
| Basic Materials        | 742.58      | -0.22 | -0.22 | -8.18 | -11.06 | -14.35 | 1.29 | 10.75 | 10.53          | 0.42                  |
| Health Care            | 482.45      | -0.06 | -0.06 | 0.00  | 1.48   | 4.40   | 1.75 | 12.11 | 1.72           | 0.24                  |
| Consumer Staples       | 650.05      | -4.33 | -4.33 | 3.35  | 4.35   | 29.58  | 1.49 | 13.84 | 1.90           | 0.20                  |
| Insurance              | 2,294.33    | -0.17 | -0.17 | 4.10  | 3.12   | 47.70  | 1.29 | 8.00  | 4.07           | 0.92                  |
| Consumer Discretionary | 1,563.19    | -0.12 | -0.12 | 4.81  | 0.26   | 5.01   |      |       |                |                       |
| Energy                 | 974.06      | 0.00  | 0.00  | 3.16  | 1.33   | -14.45 | 0.77 | 10.42 | 5.21           | 0.20                  |
| Technology             | 565.27      | -0.26 | -0.26 | -7.52 | 1.44   | -19.02 | 0.70 |       |                | 0.01                  |
| Utilities              | 457.89      | 0.00  | 0.00  | -2.25 | -6.45  | -7.45  |      |       |                |                       |



### What Move the GCC markets

#### Oil Prices

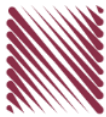
Oil prices eased on Friday ahead of the long Christmas holiday weekend on expectations Angola could increase output after leaving OPEC, but rose for the week on positive U.S. economic news and worries Houthi ship attacks would boost supply costs. Brent futures fell 32 cents, or 0.4%, to settle at \$79.07 a barrel.

#### Kuwait Market

The market closed down by - 0.36 % at 6,830.82 value traded 44.3 million KD, Premier market value reached 31.5 million KD down by - 0.16 % at 7,491.20

#### KSA Market

The market closed up today by + 0.59 % at 11,621.93

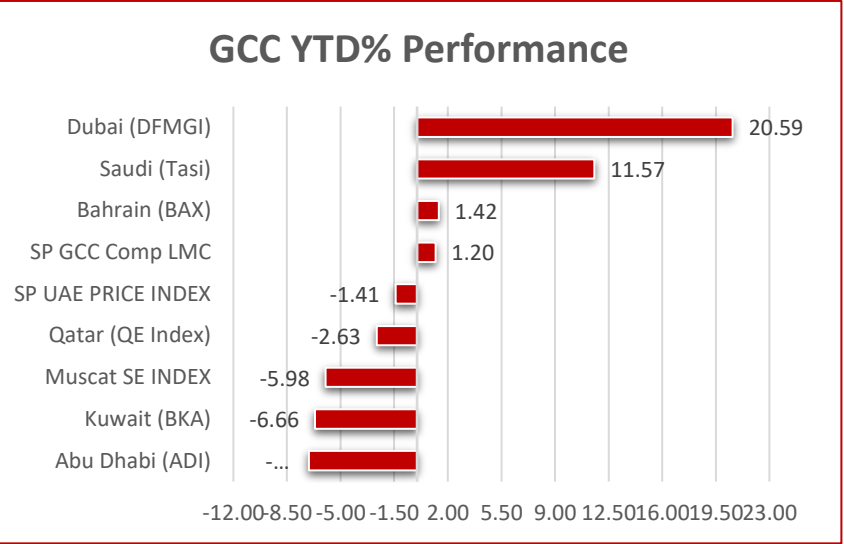


| Description      | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| Blue Chip Watch  |             |       |       |       |        |        |      |       |                |                       |
| Kuwait           |             |       |       |       |        |        |      |       |                |                       |
| NBK              | 0.912       | -0.76 | -0.76 | 3.05  | 0.66   | -11.17 | 1.73 | 13.29 | 3.71           | 7.24                  |
| KFH              | 0.728       | 0.28  | 0.28  | 4.15  | -0.68  | -2.70  | 1.87 | 17.98 | 2.31           | 10.76                 |
| ZAIN             | 0.497       | 0.40  | 0.40  | 1.64  | 2.05   | -11.72 | 1.73 | 9.94  | 7.04           | 2.15                  |
| BOUBYAN BANK     | 0.598       | -0.17 | -0.17 | 2.57  | -0.99  | -20.57 | 2.40 | 36.91 | 0.95           | 2.37                  |
| AGILITY          | 0.514       | -0.77 | -0.77 | -4.81 | -7.89  | -28.61 | 0.74 | 15.59 | 0.00           | 1.38                  |
| Saudi Arabia     |             |       |       |       |        |        |      |       |                |                       |
| ARAMCO           | 33.00       | 0.00  | 0.00  | -0.60 | -5.71  | 13.08  | 5.17 | 16.80 | 4.59           | 7,986.64              |
| SABIC            | 81.50       | 0.37  | 0.37  | 2.90  | -1.21  | -8.84  | 1.41 | 79.50 | 4.17           | 244.52                |
| STC              | 39.30       | 0.26  | 0.26  | 2.21  | 4.52   | 7.38   | 2.48 | 14.26 | 4.07           | 196.52                |
| AL-RAJHI BANK    | 83.60       | 1.33  | 1.33  | 9.42  | 23.12  | 11.17  | 3.27 | 19.84 | 2.12           | 334.43                |
| NCB              | 38.40       | 0.79  | 0.79  | 9.87  | 17.07  | 1.89   | 1.36 | 11.98 | 3.38           | 230.42                |
| Abu Dhabi        |             |       |       |       |        |        |      |       |                |                       |
| ETISALAT.AD      | 19.44       | 1.25  | -0.10 | 0.62  | -4.89  | -14.96 | 4.13 | 16.34 | 4.12           | 169.07                |
| FAB.AD           | 13.74       | 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              | 15.800      | -0.25 | -0.25 | 0.64  | 2.60   | -12.22 | 1.36 | 10.36 | 3.80           | 146.04                |
| INDUSTREIS QAT   | 12.850      | 1.90  | 1.90  | 2.80  | -6.27  | 0.31   | 2.01 | 16.66 | 8.56           | 77.80                 |
| QA ISLAMIC BK    | 20.900      | 3.31  | 3.31  | 10.00 | 12.61  | 12.61  | 1.73 | 12.28 | 2.99           | 49.42                 |
| MASRAF AL RAYA   | 2.506       | 1.46  | 1.46  | 0.80  | 12.43  | -20.97 | 0.96 | 19.82 | 3.99           | 23.32                 |
| MESAIEED PETRO   | 1.650       | 1.23  | 1.23  | -1.73 | -11.05 | -22.43 | 1.23 | 18.10 | 6.67           | 20.74                 |
| Oman             |             |       |       |       |        |        |      |       |                |                       |
| BANK MUSCAT      | 0.268       | -0.37 | -0.37 | -1.47 | -3.60  | -2.55  | 0.87 | 10.16 | 5.60           | 2.01                  |
| OMANTEL          | 1.070       | 0.94  | 0.94  | -0.93 | 8.08   | 16.30  | 1.26 | 29.60 | 3.04           | 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       | 0.00  | 0.00  | -1.05 | -8.74  | -2.42  | 0.69 | 10.18 | 2.62           | 0.46                  |
| OMINVEST         | 0.450       | 0.00  | 0.00  | -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 down today by -0.36 %The leading sector bottom performance indices today are Consumer services -4.33 % Banking -0.48 % Technology -0.26 % respectively

**KSA**  
Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.36 %. STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a positive performance today by + 1.33 %

**U.A.E**  
ETISALAT .AD flat performance today 0 %, FAB.AD flat performance today 0 %



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