



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 25th, 2023

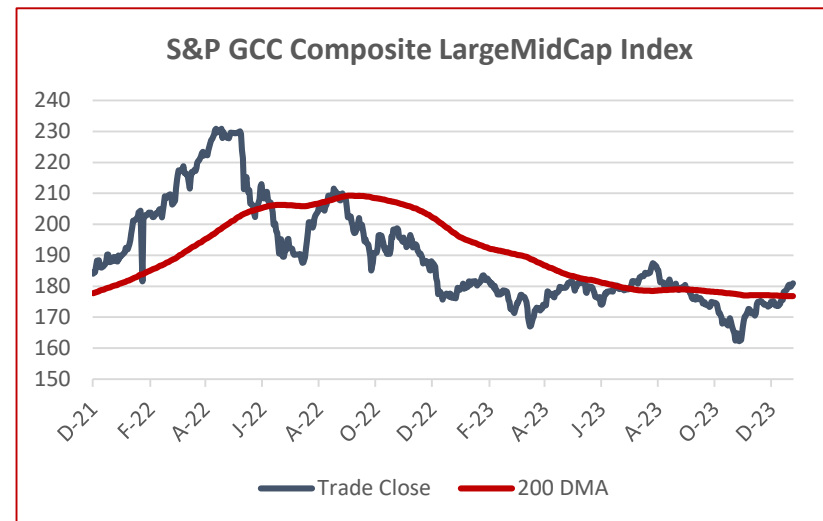




Monday, December 25, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,813.09	1.05	1.64	5.69	6.85	12.74	3.19	19.16	3.06	11,231.29
Qatar (QE Index)	10,452.17	0.50	1.62	4.09	1.95	-2.14	1.26	12.44	4.66	546.22
Dubai (DFMGI)	4,018.14	-0.12	-0.12	0.65	-3.49	20.45	1.46	9.03	4.40	576.52
Abu Dhabi (ADI)	9,484.42	-0.06	-0.06	-0.79	-3.08	-7.12	2.47	16.32	2.20	2,623.21
Bahrain (BAX)	1,927.82	0.29	0.52	-0.62	-0.58	1.72	0.76	9.55	6.07	7.03
Muscat SE INDEX	4,561.40	-0.13	-0.01	-2.08	-2.30	-6.09	0.81	10.36	4.70	6.36
SP GCC Comp LMC	182.11	0.66	1.15	4.09	4.21	1.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.19	-0.26	-0.26	-1.40	-5.28	-1.67				
Developed Markets										
MSCI World Index	3,152.49	0.01	0.01	4.26	10.49	21.12				
U.S. (S&P 500)	4,754.63	0.00	0.00	4.09	10.88	23.83	4.28	24.00	1.95	42,177.09
U.K. (FTSE 100)	7,697.51	0.00	0.00	3.27	1.18	3.30	1.62	10.21	3.84	2,048.01
Japan (topix)	2,337.40	0.04	0.04	-1.58	0.60	23.56	1.39	13.85	2.32	841,215.54
Emerging Markets										
MSCI EM Index	993.25	0.10	0.10	0.62	4.25	3.86				
China (SSE Composite)	2,918.81	0.14	0.14	-3.66	-6.16	-5.52	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	139,226.87

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,774.56	-0.47	-0.82	1.81	-1.63	-7.10	1.44	14.39	3.33	44.28
Kuwait Premier Index	7,434.85	-0.59	-0.75	1.96	-1.14	-8.39	1.60	16.07	3.15	35.58
Kuwait Main Index	5,521.60	0.01	-1.09	1.25	-3.42	-1.34	1.01	9.78	4.07	8.71
Kuwait Sector										
Banking	1,641.05	-0.76	-1.23	2.80	-2.34	-8.52	1.68	16.43	2.78	28.16
Telecom	1,088.25	-0.04	-0.24	-0.05	1.49	-7.89	1.65	9.82	6.49	3.34
Industrials	902.18	0.16	-0.09	-0.46	-1.95	-16.38	1.01	13.91	3.16	3.12
Financial Services	1,211.49	-0.19	-0.24	0.72	-2.17	-3.64	0.97	11.94	4.08	3.87
Real Estate	1,183.93	-0.48	-0.44	-1.06	0.71	-2.05	0.92	14.09	2.10	2.55
Basic Materials	750.90	1.34	1.12	-6.95	-9.86	-13.20	1.29	10.73	10.55	0.42
Health Care	482.15	0.00	-0.06	0.00	1.48	4.40	1.75	12.10	1.73	0.24
Consumer Staples	640.04	2.91	-1.54	6.36	7.39	33.36	1.43	13.25	1.98	0.19
Insurance	2,279.56	-0.48	-0.64	3.60	2.63	46.99	1.29	7.98	4.07	0.92
Consumer Discretionary	1,573.06	0.75	0.63	5.60	1.02	5.80				
Energy	974.81	0.08	0.08	3.24	1.41	-14.38	0.77	10.44	5.21	0.20
Technology	563.81	0.00	-0.26	-7.52	1.44	-19.02	0.70			0.01
Utilities	455.26	-0.57	-0.57	-2.81	-6.99	-7.98				



What Move the GCC markets

Oil Prices

Oil prices were little changed on Monday as investors focused on geopolitical tensions in the Middle East and optimism the U.S. Federal Reserve would soon start cutting interest rates, lifting global economic growth and fuel demand. Brent crude futures fell 26 cents, or 0.3%, to \$79.07 a barrel

Kuwait Market

The market closed down by – 0.47 % at 6,774.56 value traded 43.7 million KD, Premier market value reached 32.0 million KD down by – 0.59 % at 7,434.85

KSA Market

The market closed up today by + 1.05 % at 11,813.09



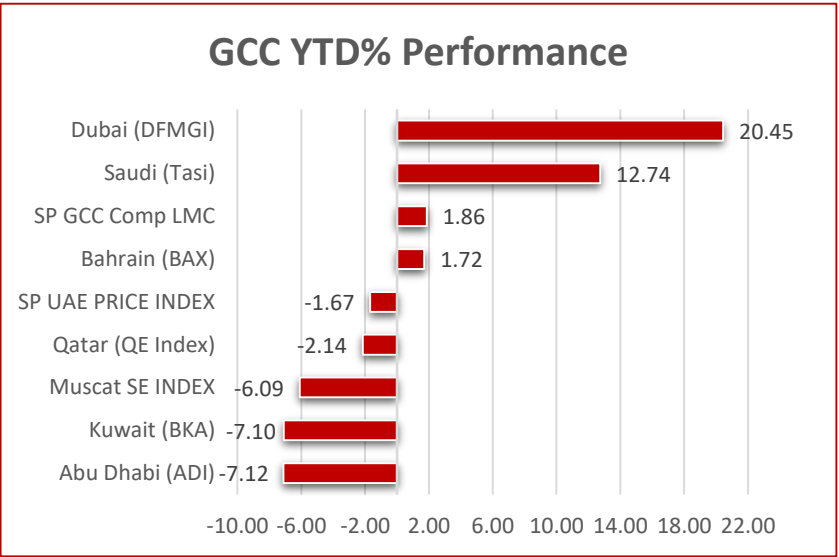
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.895	-1.86	-2.61	1.13	-1.21	-12.82	1.69	13.05	3.78	7.10
KFH	0.725	-0.41	-0.14	3.72	-1.09	-3.10	1.86	17.91	2.32	10.70
ZAIN	0.495	-0.40	0.00	1.23	1.64	-12.08	1.72	9.90	7.07	2.14
BOUBYAN BANK	0.598	0.00	-0.17	2.57	-0.99	-20.57	2.40	36.91	0.95	2.37
AGILITY	0.513	-0.19	-0.97	-5.00	-8.06	-28.75	0.74	15.55	0.00	1.37
Saudi Arabia										
ARAMCO	33.10	0.30	0.30	-0.30	-5.43	13.43	5.18	16.85	4.58	8,009.56
SABIC	81.80	0.37	0.74	3.28	-0.85	-8.50	1.41	79.79	4.16	245.38
STC	39.60	0.76	1.02	2.99	5.32	8.20	2.50	14.37	4.04	197.98
AL-RAJHI BANK	85.80	2.63	4.00	12.30	26.36	14.10	3.36	20.36	2.07	343.17
NCB	38.80	1.04	1.84	11.02	18.29	2.95	1.37	12.10	3.34	232.78
Abu Dhabi										
ETISALAT.AD	19.42	-0.10	-0.10	0.52	-4.99	-15.05	4.13	16.32	4.12	168.89
FAB.AD	13.68	-0.44	-0.44	-0.29	0.59	-20.00	1.26	10.63	3.80	151.13
EMIRATES NBD	16.95	-0.88	-0.88	-3.69	-4.78	30.38	1.02	5.12	3.54	107.06
DB ISLAMIC DB	5.71	0.18	0.18	3.44	-2.39	0.18	0.95	7.24	5.25	41.34
EMAR.DU	7.69	-0.90	-0.90	1.32	-4.35	31.23	0.91	7.10	3.25	67.97
Qatar										
QNB	15.750	-0.32	-0.57	0.32	2.27	-12.50	1.35	10.33	3.81	145.75
INDUSTREIS QAT	12.900	0.39	2.30	3.20	-5.91	0.70	2.02	16.72	8.53	78.19
QA ISLAMIC BK	21.100	0.96	4.30	11.05	13.69	13.69	1.74	12.39	2.96	49.95
MASRAF AL RAYA	2.555	1.96	3.44	2.78	14.63	-19.43	0.97	20.21	3.91	23.81
MESAIEED PETRO	1.670	1.21	2.45	-0.54	-9.97	-21.49	1.24	18.32	6.59	21.02
Oman										
BANK MUSCAT	0.269	0.37	0.00	-1.10	-3.24	-2.18	0.88	10.19	5.58	2.02
OMANTEL	1.060	-0.93	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	0.00	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.47 % The leading sector bottom performance indices today are Banking - 0.76 % Utilities - 0.57 % Real Estate & Insurance -0.48 % respectively

KSA

Saudi Armco has a positive performance today by + 0.30 %, SABIC has a positive performance today by + 0.37 %. STC has a positive performance today by + 0.76 %, Al Rajhi Bank has a positive performance today by + 2.63 %

U.A.E

ETISALAT .AD has a negative performance today - 0.10 %, FAB.AD has a negative performance today – 0.44 %



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