

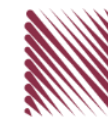


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, November 26th, 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	0.11	0.11	3.74	0.31	5.84	3.03	18.27	3.33	11,092.32
Qatar (QE Index)	10,208.50	-0.71	-0.71	6.44	-1.13	-5.10	1.22	12.06	4.81	534.58
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	-0.05	-0.05	1.11	0.60	2.93	0.77	9.73	5.96	7.12
Muscat SE INDEX	4,620.64	0.15	0.15	1.81	-0.89	-4.73	0.83	9.97	4.74	6.50
SP GCC Comp LMC	174.12	-0.10	-0.10	4.37	-0.46	-2.70	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.81	0.00	0.00	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	0.23	0.23	2.26	-3.01	-8.40	1.41	14.11	3.39	43.49
Kuwait Premier Index	7,309.44	0.14	0.14	2.48	-2.67	-9.81	1.57	15.71	3.22	34.86
Kuwait Main Index	5,444.36	0.56	0.56	1.46	-4.25	-2.18	1.00	9.72	4.11	8.63
Kuwait Sector										
Banking	1,598.06	0.16	0.16	1.47	-4.75	-10.78	1.63	15.93	2.86	27.33
Telecom	1,094.76	-0.51	-0.51	3.41	1.57	-7.81	1.66	9.88	6.45	3.36
Industrials	913.04	-0.03	-0.03	2.87	-0.80	-15.40	1.01	14.22	3.07	3.21
Financial Services	1,215.77	0.83	0.83	6.08	-1.01	-2.49	0.97	12.12	4.07	3.87
Real Estate	1,189.13	0.96	0.96	4.18	2.12	-0.68	0.92	14.04	2.10	2.55
Basic Materials	770.47	0.42	0.42	2.15	-7.13	-10.57	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	0.54	0.54	2.01	0.13	24.34	1.36	12.54	2.08	0.18
Insurance	2,236.37	-0.06	-0.06	-0.13	0.62	44.12	1.26	7.93	4.17	0.90
Consumer Discretionary	1,467.76	1.52	1.52	-0.88	-4.31	0.21				
Energy	958.60	-0.19	-0.19	6.11	-0.47	-15.96	0.76	10.25	5.30	0.20
Technology	609.64	0.00	0.00	0.96	9.68	-12.44	0.75			0.01
Utilities	463.16	-0.57	-0.57	0.58	-5.91	-6.91				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were little changed on Monday, with Brent holding above \$80 a barrel, as investors awaited the OPEC+ meeting later this week for an agreement to curb supplies into 2024. Brent crude futures edged up 12 cents, or 0.2%, to \$80.70 a barrel.

Kuwait Market

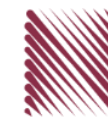
The market closed up by + 0.23 % at 6,679.44 value traded 48.3 million KD, Premier market value reached 28.8 million KD up by + 0.14 % at 7,319.69

KSA Market

The market closed down today by - 0.11 % at 11,078.08

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.877	-0.23	-0.23	0.00	-3.20	-14.58	1.66	12.78	3.86	6.96
KFH	0.700	-0.14	-0.14	2.34	-4.50	-6.44	1.79	17.29	2.40	10.34
ZAIN	0.494	-1.00	-1.00	2.70	1.44	-12.26	1.71	9.88	7.09	2.14
BOUBYAN BANK	0.601	0.50	0.50	2.56	-0.50	-20.17	2.41	37.10	0.94	2.38
AGILITY	0.537	0.37	0.37	2.09	-3.76	-25.42	0.77	16.28	0.00	1.44
Saudi Arabia										
ARAMCO	33.40	0.00	0.00	0.30	-4.57	14.45	5.23	17.00	4.54	8,088.19
SABIC	80.80	-0.12	-0.12	4.94	-2.06	-9.62	1.39	78.82	4.70	242.56
STC	37.90	-0.66	-0.66	-1.30	0.80	3.55	2.40	13.75	4.22	189.63
AL-RAJHI BANK	75.20	0.27	0.27	12.07	10.75	0.00	2.94	17.85	2.36	301.00
NCB	34.05	-0.87	-0.87	1.49	3.81	-9.66	1.20	10.62	3.81	204.44
Abu Dhabi										
ETISALAT.AD	19.52	0.00	-2.79	5.74	-4.50	-14.61	4.15	16.41	4.10	169.76
FAB.AD	13.60	0.89	0.00	7.26	0.00	-20.47	1.25	10.57	3.82	150.25
EMIRATES NBD	18.05	0.84	-0.28	6.49	1.40	38.85	1.08	5.46	3.32	114.01
DB ISLAMIC DB	5.53	0.36	1.10	2.41	-5.47	-2.98	0.92	7.01	5.42	40.04
EMAR.DU	7.08	-0.70	0.14	5.83	-11.94	20.82	0.84	6.53	3.53	62.58
Qatar										
QNB	15.720	-0.51	-0.51	5.57	2.08	-12.67	1.35	10.31	3.82	145.24
INDUSTREIS QAT	13.060	-1.51	-1.51	6.87	-4.74	1.95	2.04	16.93	8.42	79.04
QA ISLAMIC BK	18.630	-1.53	-1.53	7.07	0.38	0.38	1.54	10.94	3.35	44.03
MASRAF AL RAYA	2.535	0.04	0.04	20.71	13.73	-20.06	0.97	20.05	3.94	23.58
MESAIEED PETRO	1.610	-0.49	-0.49	1.26	-13.21	-24.31	1.20	17.67	6.83	20.23
Oman										
BANK MUSCAT	0.28	1.08	1.08	8.53	0.72	1.82	0.91	10.61	5.36	2.10
OMANTEL	1.060	0.95	0.95	2.91	7.07	15.22	1.24	29.32	3.07	0.79
BANK DHOFAR	0.160	-4.76	-4.76	0.00	-5.88	-8.57	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.296	0.00	0.00	-2.63	-4.21	2.42	0.72	10.69	2.50	0.48
OMINVEST	0.440	2.33	2.33	7.32	11.68	4.76	0.97	12.04	3.41	0.29

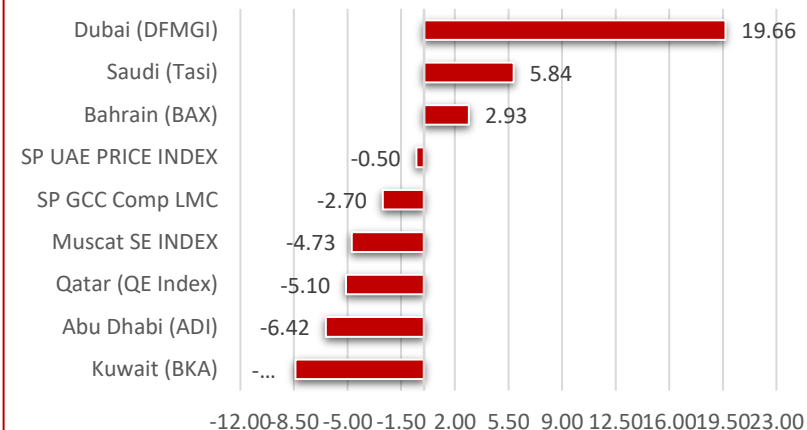
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-November-23	24.33%	14.59%	0.06%	1.98%	0.22%	5.40%	17.54%	12.93%	6.05%	5.13%
22-November-23	24.38%	14.72%	0.06%	1.97%	0.22%	5.38%	17.56%	13.14%	6.07%	5.17%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.23 %The leading sector best performance indices today are Consumer Disc 1.52 % Real estate 0.96 % Financial services 0.83 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 0.12%. STC have negative performance today by -0.66 %, Al Rajhi Bank has a positive performance today by + 0.27 %.

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD flat performance today 0.89 %



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