



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, November 27th, 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)	11,080.74	-0.09	0.02	3.65	0.22	5.75	3.03	18.27	3.33	11,092.32
Qatar (QE Index)	10,026.88	-1.08	-1.78	5.29	-2.20	-6.12	1.22	12.06	4.81	534.58
Dubai (DFMGI)	3,994.59	0.06	0.06	3.03	-4.06	19.74	1.45	8.97	4.44	580.35
Abu Dhabi (ADI)	9,515.37	-0.42	-0.42	1.84	-2.76	-6.81	2.48	16.37	2.21	2,653.74
Bahrain (BAX)	1,950.21	-0.03	-0.08	1.09	0.57	2.90	0.77	9.72	5.96	7.12
Muscat SE INDEX	4,626.20	-0.03	0.12	1.78	-0.92	-4.76	0.83	9.97	4.74	6.50
SP GCC Comp LMC	173.95	-0.31	-0.40	4.04	-0.76	-3.00	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.81	-0.66	-0.66	4.36	-4.78	-1.16				
Developed Markets										
MSCI World Index	3,007.99	-0.24	-0.24	8.65	5.42	15.57				
U.S. (S&P 500)	4,559.34	-0.20	-0.20	8.50	6.12	18.52	4.09	23.02	2.02	40,262.78
U.K. (FTSE 100)	7,460.70	-0.37	-0.37	1.90	-1.94	0.12	1.57	9.97	3.95	1,989.77
Japan (topix)	2,381.76	-0.38	-0.38	5.68	2.51	25.91	1.39	13.93	2.27	860,040.04
Emerging Markets										
MSCI EM Index	980.33	-0.28	-0.28	6.81	2.60	2.21				
China (SSE Composite)	3,031.70	-0.30	-0.30	0.43	-2.53	-1.86	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	129,201.68

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,634.87	-0.67	-0.44	1.58	-3.66	-9.01	1.41	14.13	3.38	43.58
Kuwait Premier Index	7,271.67	-0.66	-0.52	1.81	-3.31	-10.40	1.57	15.73	3.21	34.90
Kuwait Main Index	5,435.78	-0.71	-0.16	0.74	-4.93	-2.88	1.00	9.75	4.09	8.68
Kuwait Sector										
Banking	1,592.84	-0.48	-0.33	0.98	-5.21	-11.21	1.64	15.95	2.86	27.37
Telecom	1,081.46	-0.71	-1.21	2.68	0.86	-8.46	1.65	9.83	6.48	3.34
Industrials	904.94	-0.85	-0.89	1.99	-1.65	-16.12	1.01	14.22	3.07	3.21
Financial Services	1,202.91	-1.88	-1.06	4.09	-2.86	-4.32	0.98	12.22	4.04	3.91
Real Estate	1,192.18	-0.69	0.26	3.46	1.41	-1.37	0.93	14.14	2.08	2.58
Basic Materials	769.29	-0.57	-0.15	1.57	-7.66	-11.08	1.35	10.21	10.10	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	594.90	-0.31	0.23	1.69	-0.18	23.95	1.37	12.61	2.07	0.18
Insurance	2,241.01	0.27	0.21	0.14	0.89	44.50	1.26	7.79	4.18	0.90
Consumer Discretionary	1,476.40	-0.91	0.59	-1.78	-5.19	-0.70				
Energy	949.88	-0.72	-0.91	5.35	-1.18	-16.57	0.76	10.22	5.31	0.20
Technology	609.64	0.00	0.00	0.96	9.68	-12.44	0.75			0.01
Utilities	460.53	0.00	-0.57	0.58	-5.91	-6.91				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Tuesday, snapping a multi-session losing streak ahead of a crucial meeting of OPEC+, which is widely expected to deepen and extend cuts to oil production amid fears of supply being consistently higher than demand. Brent crude futures were up 45 cents, or 0.6%, at \$80.43 a barrel.

Kuwait Market

The market closed down by - 0.67 % at 6,634.87 value traded 55.9 million KD, Premier market value reached 34.5 million KD down by - 0.66 % at 7,271.67

KSA Market

The market closed down today by - 0.09 % at 11,080.74

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	0.872	-0.57	-0.80	-0.57	-3.75	-15.06	1.65	12.71	3.88	6.92
KFH	0.699	-0.14	-0.29	2.19	-4.64	-6.57	1.79	17.26	2.41	10.32
ZAIN	0.491	-0.61	-1.60	2.08	0.82	-12.79	1.70	9.82	7.13	2.13
BOUBYAN BANK	0.595	-1.00	-0.50	1.54	-1.49	-20.96	2.39	36.73	0.95	2.36
AGILITY	0.530	-1.30	-0.93	0.76	-5.02	-26.39	0.76	16.07	0.00	1.42
Saudi Arabia										
ARAMCO	33.25	-0.45	-0.45	-0.15	-5.00	13.94	5.21	16.92	4.56	8,046.50
SABIC	79.50	-1.61	-1.73	3.25	-3.64	-11.07	1.37	77.55	4.78	238.50
STC	38.30	1.06	0.39	-0.26	1.86	4.64	2.42	13.90	4.18	191.50
AL-RAJHI BANK	75.70	0.66	0.93	12.82	11.49	0.66	2.96	17.97	2.34	302.80
NCB	34.15	0.29	-0.58	1.79	4.12	-9.39	1.21	10.65	3.80	204.90
Abu Dhabi										
ETISALAT.AD	19.00	-2.66	-2.66	2.93	-7.05	-16.89	4.04	15.97	4.21	165.22
FAB.AD	13.46	-1.03	-1.03	6.15	-1.03	-21.29	1.24	10.46	3.86	148.68
EMIRATES NBD	17.65	-2.22	-2.22	4.13	-0.84	35.77	1.06	5.34	3.40	111.47
DB ISLAMIC DB	5.49	-0.72	-0.72	1.67	-6.15	-3.68	0.92	6.96	5.46	39.75
EMAR.DU	7.14	0.85	0.85	6.73	-11.19	21.84	0.85	6.59	3.50	63.10
Qatar										
QNB	15.620	-0.64	-1.14	4.90	1.43	-13.22	1.34	10.24	3.84	144.44
INDUSTREIS QAT	12.620	-3.37	-4.83	3.27	-7.95	-1.48	1.98	16.36	8.72	76.44
QA ISLAMIC BK	18.340	-1.56	-3.07	5.40	-1.19	-1.19	1.52	10.77	3.41	43.38
MASRAF AL RAYA	2.520	-0.59	-0.55	20.00	13.06	-20.53	0.96	19.93	3.97	23.46
MESAIEED PETRO	1.608	-0.12	-0.62	1.13	-13.32	-24.40	1.20	17.64	6.84	20.22
Oman										
BANK MUSCAT	0.277	-1.07	0.00	7.36	-0.36	0.73	0.90	10.50	5.42	2.08
OMANTEL	1.063	0.28	1.24	3.20	7.37	15.54	1.25	29.41	3.06	0.80
BANK DHOFAR	0.160	0.00	-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	0.00	2.33	7.32	11.68	4.76	0.97	12.04	3.41	0.29

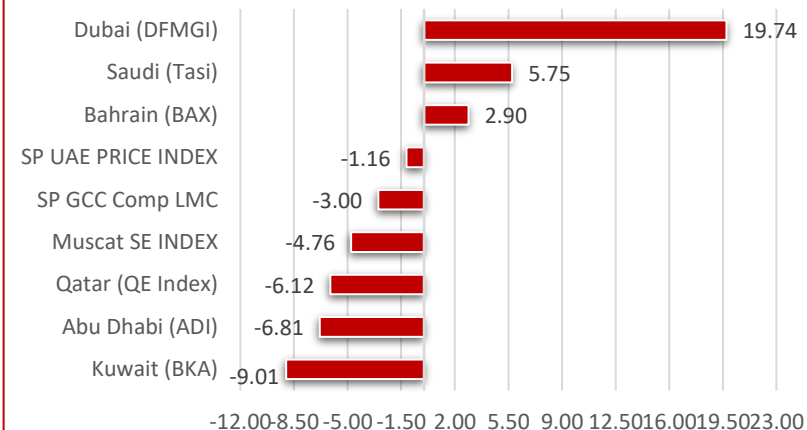
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-November-23	24.33%	14.59%	0.06%	1.98%	0.22%	5.40%	17.54%	12.93%	6.05%	5.13%
22-November-23	24.38%	14.72%	0.06%	1.97%	0.22%	5.38%	17.56%	13.14%	6.07%	5.17%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by -0.67 % The leading sector bottom performance indices today are Financial services -1.88 % Consumer Disc -0.91 % Industrials -0.85 % respectively.

KSA

Saudi Armco have negative performance today by -0.45 %, SABIC have negative performance today by -1.6 %. STC has a positive performance today by + 1.06 %, Al Rajhi Bank has a positive performance today by + 0.66 %

U.A.E

ETISALAT .AD have negative performance today by -2.66 %, FAB.AD have negative performance today by -1.03 %



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