

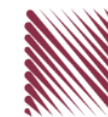


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 28, 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)	12,037.04	0.58	0.88	0.58	0.58	0.58	3.27	19.66	3.00	11,307.39
Qatar (QE Index)	10,830.63	2.27	2.27	7.86	5.64	1.40	1.31	12.89	4.50	566.21
Dubai (DFMGI)	4,059.80	0.25	0.92	1.69	-2.49	21.69	1.48	9.13	4.36	582.35
Abu Dhabi (ADI)	9,577.85	0.15	0.93	0.19	-2.12	-6.20	2.65	8.83	2.18	2,735.34
Bahrain (BAX)	1,971.49	0.52	0.52	1.64	1.67	4.02	0.79	9.91	5.87	7.21
Muscat SE INDEX	4,580.32	1.47	2.11	1.47	1.47	1.47	0.81	10.39	4.69	6.37
SP GCC Comp LMC	185.74	0.43	0.86	0.43	0.43	0.43	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.83	0.00	0.00	0.00	0.00	0.00				
Developed Markets										
MSCI World Index	3,169.25	0.00	0.00	0.00	0.00	0.00				
U.S. (S&P 500)	4,769.83	0.00	0.00	0.00	0.00	0.00	4.30	24.06	1.94	42,301.64
U.K. (FTSE 100)	7,733.24	0.00	0.00	0.00	0.00	0.00	1.63	10.26	3.82	2,056.82
Japan (topix)	2,366.39	0.19	1.28	-0.36	1.85	25.09	1.41	14.02	2.29	851,641.23
Emerging Markets										
MSCI EM Index	1,024.67	0.09	0.09	0.09	0.09	0.09				
China (SSE Composite)	2,974.93	0.68	2.06	-1.81	-4.36	-3.70	1.36	12.00		44,025.04
India (Sensex)	72,271.94	0.04	0.04	0.04	0.04	0.04	4.68	23.51	1.12	141,536.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,817.29	0.45	-0.20	2.46	-1.01	-6.51	1.44	14.41	3.32	44.35
Kuwait Premier Index	7,477.04	0.50	-0.19	2.54	-0.58	-7.87	1.60	16.06	3.15	35.57
Kuwait Main Index	5,569.71	0.25	-0.23	2.13	-2.58	-0.48	1.02	9.87	4.03	8.78
Kuwait Sector										
Banking	1,647.47	0.49	-0.85	3.20	-1.96	-8.16	1.68	16.38	2.78	28.07
Telecom	1,105.14	0.48	1.31	1.50	3.06	-6.46	1.67	9.97	6.39	3.39
Industrials	907.90	0.53	0.55	0.18	-1.32	-15.85	1.01	14.02	3.13	3.14
Financial Services	1,212.22	-0.05	-0.18	0.78	-2.11	-3.58	0.97	11.93	4.08	3.86
Real Estate	1,212.91	0.50	2.00	1.36	3.18	0.35	0.94	14.35	2.06	2.60
Basic Materials	745.93	0.32	0.45	-7.57	-10.46	-13.78	1.30	10.80	10.48	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	658.58	1.69	1.31	9.44	10.50	37.22	1.51	14.11	1.87	0.20
Insurance	2,292.80	0.08	-0.07	4.20	3.22	47.84	1.29	7.99	4.07	0.92
Consumer Discretionary	1,603.91	1.46	2.60	7.67	3.00	7.87				
Energy	949.01	-2.46	-2.57	0.51	-1.27	-16.65	0.75	10.16	5.35	0.20
Technology	578.36	2.71	2.32	-5.13	4.06	-16.93	0.71			0.01
Utilities	455.26	0.58	-0.57	-2.81	-6.99	-7.98				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

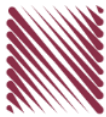
Oil prices rose on Tuesday after Iran dispatched a warship to the Red Sea, as the situation remains tense in the critical waterway for global shipments that has seen vessels attacked by Yemen's Houthi rebels. Global crude benchmark Brent jumped 1.6% to \$78.27 a barrel.

Kuwait Market

The market closed up by 0.45 % at 6,817.29 value traded 50.7 million KD, Premier market value reached 37.6 million KD up by 0.50 % at 7,477.04

KSA Market

The market closed up today by 0.58 % at 12,037.04



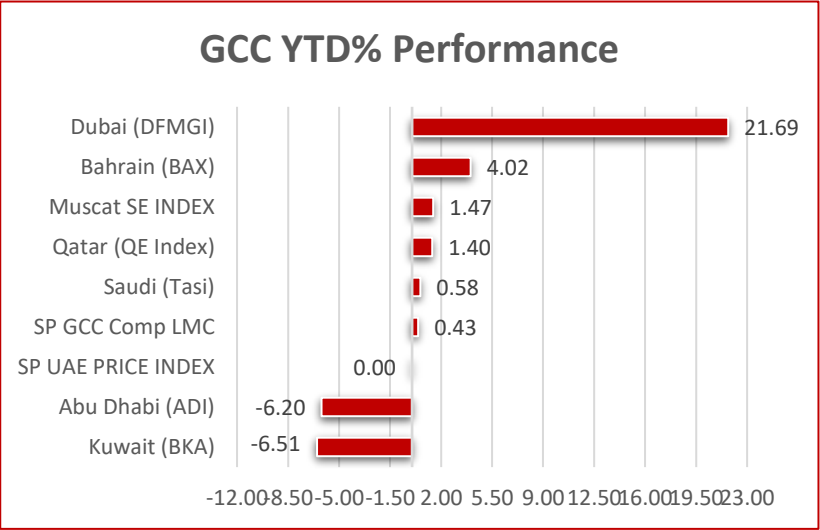
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.894	0.79	-2.72	1.02	-1.32	-12.92	1.69	13.03	3.78	7.09
KFH	0.726	0.28	0.00	3.86	-0.95	-2.96	1.86	17.93	2.32	10.72
ZAIN	0.507	0.40	2.42	3.68	4.11	-9.95	1.76	10.14	6.90	2.19
BOUBYAN BANK	0.600	0.00	0.17	2.92	-0.66	-20.30	2.41	37.04	0.94	2.38
AGILITY	0.509	0.59	-1.74	-5.74	-8.78	-29.31	0.73	15.43	0.00	1.36
Saudi Arabia										
ARAMCO	33.05	0.15	0.00	0.15	0.15	0.15	5.17	16.82	4.59	7,997.46
SABIC	83.70	0.24	0.48	0.24	0.24	0.24	1.44	81.65	4.06	251.08
STC	40.40	0.00	-0.12	0.00	0.00	0.00	2.55	14.66	3.96	201.98
AL-RAJHI BANK	86.80	0.35	-0.23	0.35	0.35	0.35	3.39	20.60	2.04	347.17
NCB	38.80	0.39	0.26	0.39	0.39	0.39	1.37	12.10	3.34	232.78
Abu Dhabi										
ETISALAT.AD	19.64	-1.21	1.03	1.66	-3.91	-14.09	4.17	16.51	4.07	170.81
FAB.AD	13.96	0.29	1.60	1.75	2.65	-18.36	1.28	10.85	3.72	154.22
EMIRATES NBD	17.30	1.17	1.17	-1.70	-2.81	33.08	1.04	5.23	3.47	109.28
DB ISLAMIC DB	5.72	0.00	0.35	3.62	-2.22	0.35	0.96	7.25	5.24	41.42
EMAR.DU	7.92	-0.50	2.06	4.35	-1.49	35.15	0.94	7.31	3.16	70.00
Qatar										
QNB	16.530	2.99	2.99	5.29	7.34	-8.17	1.42	10.84	3.63	152.68
INDUSTREIS QAT	13.080	1.40	1.40	4.64	-4.60	2.11	2.05	16.96	8.41	79.13
QA ISLAMIC BK	21.500	2.87	2.87	13.16	15.84	15.84	1.78	12.63	2.91	50.80
MASRAF AL RAYA	2.655	2.43	2.43	6.80	19.11	-16.27	1.01	21.00	3.77	24.69
MESAIEED PETRO	1.788	1.02	1.02	6.49	-3.61	-15.94	1.33	19.62	6.15	22.46
Oman										
BANK MUSCAT	0.267	1.14	0.75	1.14	1.14	1.14	0.87	10.12	5.62	2.00
OMANTEL	1.065	0.47	2.40	0.47	0.47	0.47	1.25	29.46	3.05	0.80
BANK DHOFAR	0.160	0.00	6.67	0.00	0.00	0.00	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.290	3.57	3.20	3.57	3.57	3.57	0.71	10.47	2.55	0.47
OMINVEST	0.430	2.38	0.00	2.38	2.38	2.38	0.95	11.77	3.49	0.29

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
20-December-23	24.45%	14.99%	0.06%	1.99%	0.19%	5.53%	17.58%	12.88%	6.11%	5.36%
27-December-23	24.49%	14.88%	0.06%	2.02%	0.19%	5.56%	17.66%	12.92%	6.13%	5.51%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.45 %The leading sector best performance indices today are Technology 2.71 % Consumer services 1.69 % Consumer Disc 1.46 % respectively.

KSA

Saudi Armco have negative performance today by -0.3 %, SABIC have positive performance today by + 0.48 %. STC has a positive performance today by + 0.5 %, Al Rajhi Bank has a positive performance today by + 0.58 %.

U.A.E

ETISALAT .AD has a positive performance today by + 1.02 %, FAB.AD has a positive performance today by + 0.29 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw