



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, November 29th, 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)	11,103.05	0.02	0.23	3.86	0.43	5.96	3.04	18.25	3.32	11,069.23
Qatar (QE Index)	9,991.81	-0.15	-2.12	4.92	-2.54	-6.45	1.21	11.89	4.88	528.80
Dubai (DFMGI)	3,999.58	-0.23	0.19	3.16	-3.94	19.89	1.46	9.01	4.42	581.34
Abu Dhabi (ADI)	9,553.45	0.13	-0.02	2.24	-2.37	-6.44	2.49	16.45	2.19	2,665.17
Bahrain (BAX)	1,942.89	-0.44	-0.45	0.71	0.19	2.51	0.77	9.68	5.99	7.09
Muscat SE INDEX	4,654.62	0.47	0.74	2.40	-0.31	-4.18	0.83	9.96	4.74	6.50
SP GCC Comp LMC	173.92	-0.09	-0.20	4.26	-0.56	-2.80	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.72	0.08	0.02	5.07	-4.13	-0.49				
Developed Markets										
MSCI World Index	3,012.57	0.05	-0.04	8.86	5.63	15.80				
U.S. (S&P 500)	4,554.89	-0.09	-0.19	8.51	6.12	18.52	4.09	22.98	2.02	40,228.70
U.K. (FTSE 100)	7,423.46	-0.43	-0.86	1.39	-2.43	-0.38	1.56	9.87	3.99	1,973.41
Japan (topix)	2,364.50	-0.51	-1.11	4.92	1.77	24.99	1.38	13.84	2.29	853,295.90
Emerging Markets										
MSCI EM Index	985.47	-0.25	0.28	7.41	3.18	2.79				
China (SSE Composite)	3,021.69	-0.56	-0.63	0.10	-2.85	-2.19	1.36	12.00		44,025.04
India (Sensex)	66,901.91	1.10	1.41	4.74	1.63	9.96	4.32	21.77	1.21	130,945.66

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,603.46	-0.53	-0.91	1.10	-4.11	-9.44	1.41	14.03	3.40	43.33
Kuwait Premier Index	7,237.60	-0.55	-0.98	1.33	-3.77	-10.82	1.56	15.64	3.23	34.72
Kuwait Main Index	5,409.04	-0.47	-0.65	0.24	-5.39	-3.35	0.99	9.63	4.11	8.62
Kuwait Sector										
Banking	1,584.27	-0.48	-0.86	0.44	-5.72	-11.69	1.63	15.88	2.87	27.24
Telecom	1,088.44	0.02	-0.58	3.34	1.51	-7.87	1.65	9.82	6.49	3.34
Industrials	896.22	-0.84	-1.84	1.01	-2.59	-16.93	1.00	14.06	3.10	3.18
Financial Services	1,191.76	-1.38	-1.97	3.12	-3.76	-5.21	0.96	11.83	4.10	3.85
Real Estate	1,186.69	-0.52	-0.21	2.98	0.95	-1.82	0.93	14.09	2.10	2.56
Basic Materials	768.69	-0.50	-0.23	1.49	-7.73	-11.15	1.35	10.20	10.12	0.44
Health Care	482.15	2.64	2.64	3.11	1.48	4.40	1.70	11.78	1.77	0.23
Consumer Staples	587.71	-0.69	-0.98	0.46	-1.39	22.45	1.36	12.49	2.08	0.18
Insurance	2,203.14	-0.92	-1.49	-1.55	-0.81	42.06	1.25	7.74	4.20	0.90
Consumer Discretionary	1,489.24	0.05	1.46	-0.93	-4.36	0.16				
Energy	944.57	0.25	-1.46	4.76	-1.74	-17.04	0.74	10.05	5.39	0.20
Technology	609.64	0.00	0.00	0.96	9.68	-12.44	0.75			0.01
Utilities	457.89	-0.57	-1.14	0.00	-6.45	-7.45				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Thursday on weaker-than-expected Chinese manufacturing data, but investors maintained caution ahead of an OPEC+ meeting where production cuts are expected. Brent crude futures fell 28 cents, or 0.3%, to \$82.90 a barrel.

Kuwait Market

The market closed down by - 0.53 % at 6,603.46 value traded 56.8 million KD, Premier market value reached 36.6 million KD down by - 0.55 % at 7,237.60

KSA Market

The market closed up today by + 0.02 % at 11,103.05



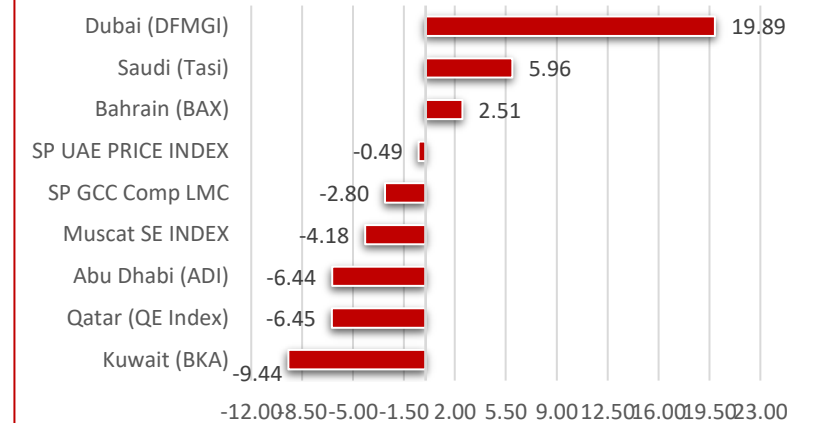
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.868	-0.57	-1.25	-1.03	-4.19	-15.45	1.64	12.65	3.90	6.89
KFH	0.695	-0.57	-0.86	1.61	-5.18	-7.11	1.78	17.16	2.42	10.27
ZAIN	0.495	0.20	-0.80	2.91	1.64	-12.08	1.72	9.90	7.07	2.14
BOUBYAN BANK	0.588	-0.34	-1.67	0.34	-2.65	-21.89	2.36	36.30	0.96	2.33
AGILITY	0.524	-0.95	-2.06	-0.38	-6.09	-27.22	0.75	15.89	0.00	1.40
Saudi Arabia										
ARAMCO	33.30	0.15	-0.30	0.00	-4.86	14.11	5.21	16.95	4.55	8,059.89
SABIC	79.30	0.38	-1.98	2.99	-3.88	-11.30	1.37	77.35	4.79	237.94
STC	38.45	0.00	0.79	0.13	2.26	5.05	2.43	13.95	4.16	192.28
AL-RAJHI BANK	75.70	0.00	0.93	12.82	11.49	0.66	2.96	17.97	2.34	302.85
NCB	34.25	0.00	-0.29	2.09	4.42	-9.13	1.21	10.68	3.79	205.53
Abu Dhabi										
ETISALAT.AD	19.28	0.42	-1.23	4.44	-5.68	-15.66	4.10	16.20	4.15	167.65
FAB.AD	13.58	0.15	-0.15	7.10	-0.15	-20.58	1.25	10.56	3.83	150.00
EMIRATES NBD	17.75	-0.56	-1.66	4.72	-0.28	36.54	1.07	5.37	3.38	112.10
DB ISLAMIC DB	5.53	0.18	0.00	2.41	-5.47	-2.98	0.92	7.01	5.42	40.03
EMAR.DU	7.42	1.23	4.80	10.91	-7.71	26.62	0.88	6.85	3.37	65.57
Qatar										
QNB	15.850	0.63	0.32	6.45	2.92	-11.94	1.36	10.39	3.79	146.45
INDUSTREIS QAT	12.490	-0.16	-5.81	2.21	-8.90	-2.50	1.95	16.19	8.81	75.59
QA ISLAMIC BK	18.590	0.49	-1.74	6.84	0.16	0.16	1.54	10.92	3.36	43.94
MASRAF AL RAYA	2.499	-0.28	-1.38	19.00	12.11	-21.19	0.95	19.76	4.00	23.25
MESAIEED PETRO	1.589	-0.63	-1.79	-0.06	-14.34	-25.29	1.18	17.43	6.92	19.97
Oman										
BANK MUSCAT	0.275	-0.36	-0.72	6.59	-1.08	0.00	0.90	10.42	5.45	2.06
OMANTEL	1.085	1.97	3.33	5.34	9.60	17.93	1.27	30.01	3.00	0.81
BANK DHOFAR	0.162	1.25	-3.57	1.25	-4.71	-7.43	0.67	16.72	3.09	0.49
NAT BANK OF OMAN	0.290	0.00	-2.03	-4.61	-6.15	0.35	0.71	10.47	2.55	0.47
OMINVEST	0.480	2.13	11.63	17.07	21.83	14.29	1.06	13.14	3.13	0.32

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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GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by -0.53 %The leading sector bottom performance indices today are Financial services -1.38 % Insurance -0.92 % Industrials -0.84 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC have positive performance today by + 0.37 %. STC flat performance today 0 %, Al Rajhi Bank flat performance today 0 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.42 %, FAB.AD has a positive performance today by + 0.15 %



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