

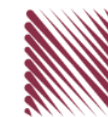


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 2nd 2023

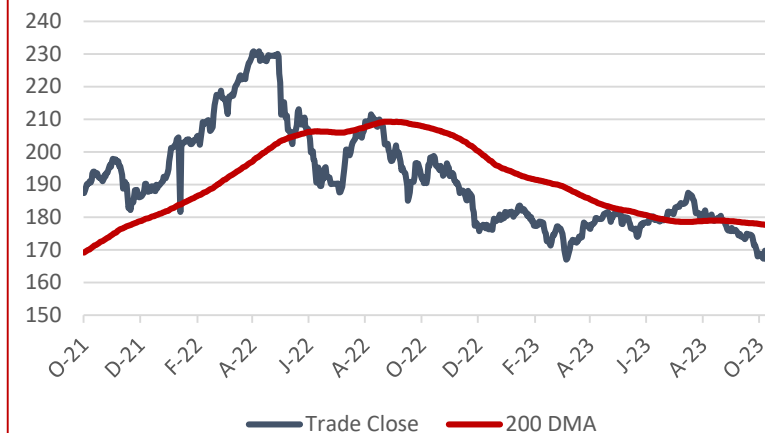




Thursday, November 2, 2023

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,853.36	0.36	4.27	1.53	-1.83	3.58	2.95	17.32	3.25	10,934.65
Qatar (QE Index)	9,712.47	1.39	4.22	1.98	-5.26	-9.07	1.17	11.56	5.02	514.76
Dubai (DFMGI)	3,929.81	0.42	3.78	1.36	-5.61	17.80	1.43	9.28	4.51	567.34
Abu Dhabi (ADI)	9,510.49	0.25	2.96	1.78	-2.81	-6.86	2.47	15.88	2.30	2,641.53
Bahrain (BAX)	1,917.86	-0.22	-1.20	-0.59	-1.10	1.19	0.76	9.19	6.06	7.01
Muscat SE INDEX	4,492.34	-0.22	-1.35	-1.17	-3.78	-7.52	0.80	9.26	4.96	6.22
SP GCC Comp LMC	170.41	0.15	5.02	2.24	-2.48	-4.68	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.39	0.57	6.07	3.20	-5.84	-2.26				
Developed Markets										
MSCI World Index	2,883.80	1.10	5.56	4.16	1.07	10.80				
U.S. (S&P 500)	4,358.34	0.94	5.85	3.92	1.64	13.51	3.93	22.12	2.09	38,495.41
U.K. (FTSE 100)	7,417.73	-0.39	1.73	1.31	-2.50	-0.46	1.55	9.81	3.98	1,970.51
Japan (topix)	2,322.39	0.51	3.00	3.05	-0.04	22.77	1.36	13.38	2.28	839,730.27
Emerging Markets										
MSCI EM Index	948.26	1.90	3.10	3.61	-0.47	-0.85				
China (SSE Composite)	3,030.80	0.71	0.43	0.40	-2.56	-1.89	1.36	12.00		44,025.04
India (Sensex)	64,363.78	0.44	0.91	0.77	-2.22	5.79	4.16	20.97	1.26	125,983.68
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,533.29	0.95	0.45	0.02	-5.13	-10.41	1.39	14.18	3.45	42.68
Kuwait Premier Index	7,171.94	1.25	1.29	0.41	-4.64	-11.63	1.54	15.88	3.27	34.26
Kuwait Main Index	5,320.06	-0.14	-2.60	-1.41	-6.95	-4.94	0.97	9.59	4.20	8.42
Kuwait Sector										
Banking	1,579.26	1.05	0.40	0.12	-6.02	-11.97	1.62	15.77	2.89	27.05
Telecom	1,053.81	1.22	2.38	0.05	-1.72	-10.80	1.59	9.69	6.70	3.23
Industrials	885.11	1.01	1.69	-0.24	-3.80	-17.96	0.98	15.30	3.16	3.11
Financial Services	1,164.79	1.39	-0.44	0.79	-5.94	-7.35	0.93	12.94	4.25	3.71
Real Estate	1,134.06	0.44	-1.21	-1.58	-3.53	-6.18	0.88	13.93	2.20	2.43
Basic Materials	751.16	0.36	-1.06	-0.83	-9.83	-13.17	1.31	9.78	10.41	0.42
Health Care	467.62	0.00	-0.43	0.00	-1.58	1.25	1.70	12.01	1.78	0.23
Consumer Staples	590.14	0.00	0.76	0.88	-0.98	22.96	1.35	74.48	2.09	0.18
Insurance	2,219.09	-1.44	-1.03	-0.84	-0.09	43.09	1.24	7.39	4.21	0.89
Consumer Discretionary	1,497.44	-0.27	0.56	-0.38	-3.84	0.71				
Energy	936.79	2.39	3.65	3.89	-2.55	-17.72	0.74	9.41	5.42	0.20
Technology	589.27	-2.41	-3.34	-2.41	6.02	-15.36	0.73			0.01
Utilities	465.79	1.14	0.57	1.73	-4.84	-5.85				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

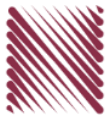
Oil prices settled more than 2% lower as supply concerns driven by Middle East tensions eased, while jobs data raised expectations the U.S. Federal Reserve could be done hiking interest rates in the biggest oil consuming economy. Brent crude futures were down \$1.92, or 2.3%, to \$84.89 a barrel.

Kuwait Market

The market closed up by + 0.95 % at 6,533.29 value traded 39.6 million KD, Premier market value reached 33.6 million KD up by + 1.25 % at 7,171.94

KSA Market

The market closed up today by + 0.36 % at 10,853.36



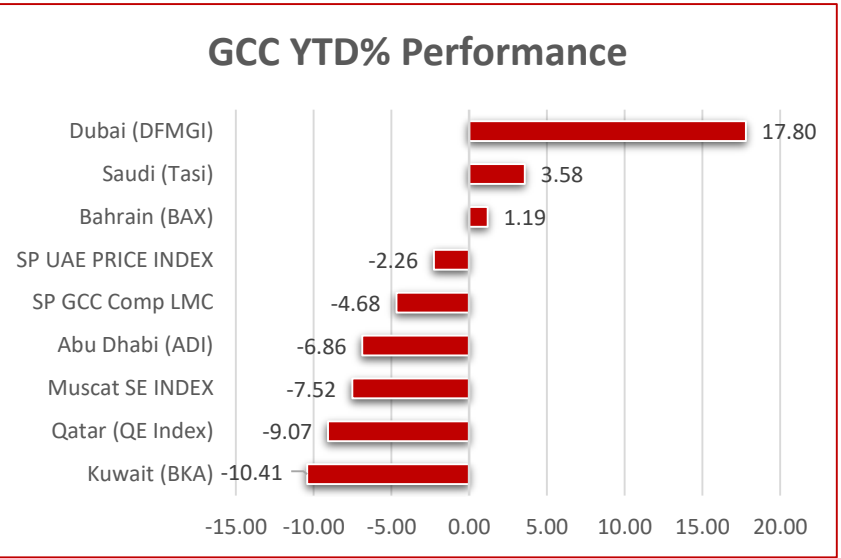
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.881	1.38	1.73	0.46	-2.76	-14.19	1.67	12.84	3.84	7.04
KFH	0.690	1.32	1.77	0.88	-5.87	-7.78	1.77	17.04	2.44	10.29
ZAIN	0.483	2.11	4.77	0.42	-0.82	-14.21	1.69	9.95	7.25	2.10
BOUBYAN BANK	0.581	0.17	-1.19	-0.85	-3.81	-22.82	2.33	35.86	0.97	2.32
AGILITY	0.520	0.97	1.36	-1.14	-6.81	-27.78	0.70	19.30	0.00	1.41
Saudi Arabia										
ARAMCO	33.15	0.00	-0.15	-0.45	-5.29	13.60	5.25	15.79	4.08	8,022.30
SABIC	78.30	3.43	2.09	1.69	-5.09	-12.42	1.33	59.26	4.85	234.90
STC	38.25	-0.78	6.10	-0.39	1.73	4.51	2.53	15.40	4.18	191.25
AL-RAJHI BANK	70.00	0.14	9.03	4.32	3.09	-6.91	2.74	16.61	2.54	280.00
NCB	36.00	2.86	13.21	7.30	9.76	-4.48	1.27	11.23	3.60	216.00
Abu Dhabi										
ETISALAT.AD	19.06	2.31	8.33	5.63	-4.60	-14.70	4.06	17.21	4.10	169.59
FAB.AD	13.14	0.61	6.27	4.26	-2.79	-22.69	1.21	10.28	3.93	146.05
EMIRATES NBD	17.15	2.62	6.99	3.83	-1.12	35.38	1.06	5.32	3.41	111.17
DB ISLAMIC DB	5.46	-0.73	3.83	0.37	-7.35	-4.91	0.91	6.87	5.54	39.24
EMAR.DU	6.77	0.89	8.07	2.09	-15.05	16.55	0.85	7.64	3.66	60.37
Qatar										
QNB	15.100	0.73	2.03	1.41	-1.95	-16.11	1.30	9.90	3.97	140.86
INDUSTREIS QAT	12.500	1.21	-1.57	2.29	-8.83	-2.42	1.96	16.20	8.80	75.81
QA ISLAMIC BK	17.900	1.94	5.17	2.87	-3.56	-3.56	1.48	10.51	3.49	42.53
MASRAF AL RAYA	2.116	1.54	11.66	0.76	-5.07	-33.27	0.81	16.73	4.73	19.72
MESAIEED PETRO	1.595	0.44	6.19	0.31	-14.02	-25.01	1.19	17.50	6.90	20.05
Oman										
BANK MUSCAT	0.255	0.39	0.39	-1.16	-8.27	-7.27	0.83	9.66	5.88	1.91
OMANTEL	1.020	0.00	0.00	-0.97	3.03	10.87	1.22	32.99	3.19	0.77
BANK DHOFAR	0.160	0.00	0.00	0.00	-5.88	-8.57	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.299	0.00	-0.99	-1.64	-3.24	3.46	0.73	10.79	2.47	0.49
OMINVEST	0.400	-2.44	-4.31	-2.44	1.52	-4.76	0.89	5.88	3.75	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
25-October-23	24.25%	14.71%	0.07%	2.06%	0.22%	5.29%	17.53%	13.26%	6.09%	5.05%
1-November-23	24.23%	14.64%	0.07%	2.00%	0.22%	5.39%	17.53%	12.98%	6.04%	5.10%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.95 % The leading sector top performance indices today are Energy + 2.39 % Financial Services + 1.39 % Telecom + 1.22 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by - 3.43 %, STC has a negative performance today by - 0.78 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E

ETISALAT .AD has a positive performance today by + 2.31 %, FAB.AD has a positive performance today by + 0.61 %



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