



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 4th, 2023





Monday, December 4, 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)	11,191.39	-0.25	0.12	0.12	1.22	6.80	3.07	18.44	3.30	11,078.18
Qatar (QE Index)	9,959.96	-0.76	-0.81	-0.81	-2.85	-6.75	1.20	11.86	4.89	526.06
Dubai (DFMGI)	3,987.75	-0.12	-0.11	-0.12	-4.22	19.53	1.45	8.99	4.43	579.00
Abu Dhabi (ADI)	9,539.08	-0.21	-0.17	-0.21	-2.52	-6.58	2.49	16.44	2.19	2,651.16
Bahrain (BAX)	1,949.93	0.45	0.52	0.52	0.56	2.88	0.77	9.72	5.96	7.12
Muscat SE INDEX	4,667.79	0.21	0.21	0.21	-0.03	-3.90	0.84	9.98	4.73	6.51
SP GCC Comp LMC	175.11	-0.29	-0.20	-0.20	-0.08	-2.33	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.12	-0.24	-0.24	-0.24	-4.16	-0.52				

Developed Markets										
MSCI World Index	3,026.59	-0.46	-0.46	0.10	6.08	16.29				
U.S. (S&P 500)	4,594.63	-0.54	-0.54	0.04	6.57	19.02	4.13	23.15	1.99	40,566.10
U.K. (FTSE 100)	7,512.96	-0.22	-0.22	0.79	-1.25	0.82	1.58	10.00	3.95	1,997.54
Japan (topix)	2,362.65	-0.83	-0.83	-0.52	1.69	24.89	1.41	14.00	2.29	851,783.46
Emerging Markets										
MSCI EM Index	982.14	-0.19	-0.19	-0.70	2.88	2.49				
China (SSE Composite)	3,022.91	-0.29	-0.29	-0.22	-2.82	-2.15	1.36	12.00		44,025.04
India (Sensex)	68,865.12	2.05	2.05	2.80	4.61	13.19	4.46	22.41	1.18	134,410.76

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,636.64	0.06	-0.26	-0.26	-3.63	-8.99	1.41	14.02	3.40	43.30
Kuwait Premier Index	7,259.36	-0.06	-0.44	-0.44	-3.48	-10.55	1.56	15.62	3.24	34.66
Kuwait Main Index	5,477.03	0.52	0.43	0.43	-4.20	-2.14	1.00	9.65	4.10	8.64
Kuwait Sector										
Banking	1,589.21	-0.22	-0.45	-0.45	-5.42	-11.41	1.63	15.89	2.87	27.25
Telecom	1,085.12	1.01	-0.34	-0.34	1.20	-8.15	1.63	9.69	6.57	3.30
Industrials	899.11	-0.11	-0.79	-0.79	-2.28	-16.66	1.00	14.04	3.11	3.16
Financial Services	1,210.02	0.38	0.60	0.60	-2.29	-3.76	0.96	11.79	4.11	3.84
Real Estate	1,193.35	0.26	-0.28	-0.28	1.51	-1.27	0.92	14.07	2.10	2.55
Basic Materials	793.87	0.78	-1.63	-1.63	-4.71	-8.23	1.37	10.40	9.92	0.44
Health Care	482.15	0.00	0.00	0.00	1.48	4.40	1.75	12.10	1.73	0.24
Consumer Staples	598.69	-0.34	-0.51	-0.51	0.45	24.74	1.38	12.66	2.05	0.18
Insurance	2,214.53	-0.21	0.64	0.64	-0.30	42.80	1.25	7.73	4.21	0.89
Consumer Discretionary	1,534.38	2.66	3.01	3.01	-1.46	3.20				
Energy	945.08	-0.66	0.09	0.09	-1.68	-16.99	0.75	10.20	5.34	0.20
Technology	582.00	0.00	-4.53	-4.53	4.71	-16.41	0.72			0.01
Utilities	460.53	-1.13	-1.68	-1.68	-5.91	-6.91				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil futures rose on Monday as geopolitical tension in the Middle East returned to focus, spurring concerns about supply from the region, but uncertainty over OPEC+ voluntary output cuts and global fuel demand growth clouded the sector's outlook. Brent crude futures climbed 28 cents, or 0.4%, to \$79.16 a barrel.

Kuwait Market

The market closed up by + 0.06 % at 6,636.64 value traded 42.1 million KD, Premier market value reached 25.5 million KD down by – 0.06 % at 7,259.36

KSA Market

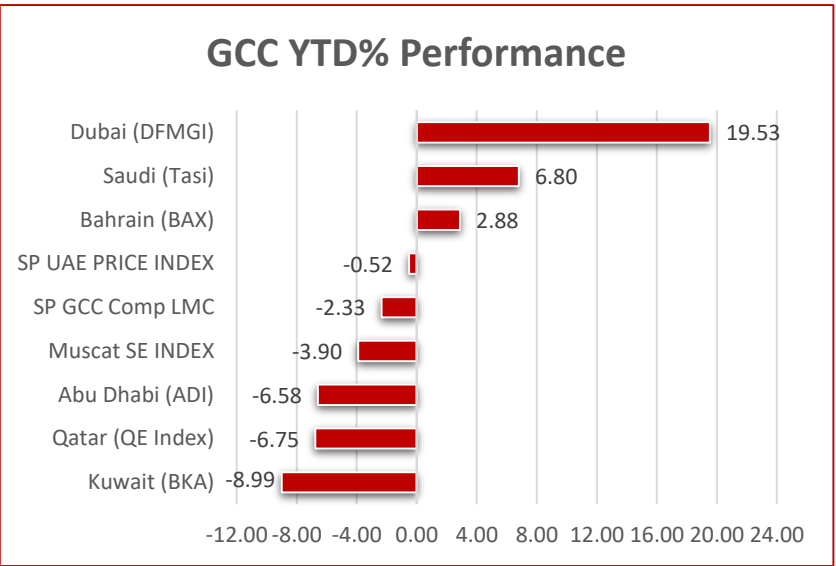
The market closed down today by - 0.25 % at 11,191.39



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.875	-0.34	-1.13	-1.13	-3.42	-14.77	1.66	12.76	3.86	6.94
KFH	0.697	-0.14	-0.29	-0.29	-4.91	-6.84	1.79	17.21	2.41	10.30
ZAIN	0.490	1.24	0.20	0.20	0.62	-12.97	1.70	9.80	7.14	2.12
BOUBYAN BANK	0.582	-0.68	-0.17	-0.17	-3.64	-22.69	2.34	35.93	0.97	2.31
AGILITY	0.530	-0.56	-1.85	-1.85	-5.02	-26.39	0.76	16.07	0.00	1.42
Saudi Arabia										
ARAMCO	33.20	-0.45	0.00	0.00	-5.14	13.77	5.20	16.90	4.56	8,034.40
SABIC	79.80	-0.37	0.76	0.76	-3.27	-10.74	1.38	77.84	4.76	239.40
STC	38.15	-0.39	-0.78	-0.78	1.46	4.23	2.41	13.84	4.19	190.75
AL-RAJHI BANK	76.80	0.00	0.52	0.52	13.11	2.13	3.00	18.23	2.31	307.20
NCB	34.60	-0.29	-1.00	-1.00	5.49	-8.20	1.22	10.79	3.75	207.60
Abu Dhabi										
ETISALAT.AD	19.36	0.21	-0.82	0.21	-5.28	-15.31	4.11	16.27	4.13	168.37
FAB.AD	13.70	-0.15	0.74	-0.15	0.74	-19.88	1.26	10.65	3.80	151.35
EMIRATES NBD	17.50	-0.57	-3.05	-0.57	-1.69	34.62	1.05	5.29	3.43	110.54
DB ISLAMIC DB	5.54	0.36	0.18	0.36	-5.30	-2.81	0.93	7.02	5.42	40.11
EMAR.DU	7.55	-0.53	6.64	-0.53	-6.09	28.84	0.90	6.97	3.31	66.73
Qatar										
QNB	15.680	-0.44	-0.13	-0.13	1.82	-12.89	1.35	10.28	3.83	144.84
INDUSTREIS QAT	12.350	-1.83	-1.20	-1.20	-9.92	-3.59	1.93	16.01	8.91	74.73
QA ISLAMIC BK	18.800	-0.48	-1.05	-1.05	1.29	1.29	1.55	11.04	3.32	44.43
MASRAF AL RAYA	2.400	-3.30	-3.46	-3.46	7.67	-24.31	0.92	18.98	4.17	22.32
MESAIEED PETRO	1.615	-1.52	-3.81	-3.81	-12.94	-24.07	1.20	17.72	6.81	20.29
Oman										
BANK MUSCAT	0.274	0.37	0.74	0.74	-1.44	-0.36	0.89	10.38	5.47	2.06
OMANTEL	1.096	1.48	1.48	1.48	10.71	19.13	1.29	30.32	2.97	0.82
BANK DHOFAR	0.160	0.00	-1.23	-1.23	-5.88	-8.57	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.285	0.00	0.00	0.00	-7.77	-1.38	0.70	10.29	2.60	0.46
OMINVEST	0.475	-2.06	1.06	1.06	20.56	13.10	1.04	13.00	3.16	0.32
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-November-23	24.38%	14.72%	0.06%	1.97%	0.22%	5.38%	17.56%	13.14%	6.07%	5.17%
29-November-23	24.39%	14.80%	0.06%	1.97%	0.20%	5.38%	17.57%	13.13%	6.08%	5.19%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.



Leading Sector, Security Performance

Kuwait

The market is down today by - 0.06 % The leading sector bottom performance indices today are Utilities -1.13 % Energy -0.66 % Consumer Staples -0.34 % respectively

KSA

Saudi Armco has a negative performance today by - 0.45 %, SABIC has a negative performance today by - 0.37 %. STC has a negative performance today by – 0.39 %, Al Rajhi Bank has a flat performance today

U.A.E

ETISALAT .AD has a positive performance today by + 0.21 %, FAB.AD has a negative performance today by - 0.15 %



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