

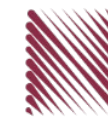


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, December 5th, 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)	11,143.83	-0.42	-0.30	-0.30	0.79	6.35	3.07	18.49	3.30	11,038.74
Qatar (QE Index)	9,944.91	-0.15	-0.96	-0.96	-2.99	-6.89	1.20	11.84	4.90	525.72
Dubai (DFMGI)	3,978.20	-0.24	-0.24	-0.35	-4.45	19.25	1.45	8.97	4.44	578.76
Abu Dhabi (ADI)	9,520.07	-0.20	-0.20	-0.41	-2.71	-6.77	2.48	16.40	2.20	2,640.46
Bahrain (BAX)	1,942.22	-0.40	0.13	0.13	0.16	2.48	0.77	9.66	6.00	7.09
Muscat SE INDEX	4,599.90	-1.45	-1.25	-1.25	-1.48	-5.30	0.82	9.82	4.80	6.41
SP GCC Comp LMC	173.82	-0.45	-0.65	-0.65	-0.53	-2.77	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.24	-0.40	-0.64	-0.64	-4.54	-0.91				
Developed Markets										
MSCI World Index	3,023.22	-0.11	-0.57	-0.01	5.96	16.16				
U.S. (S&P 500)	4,567.18	-0.06	-0.60	-0.01	6.51	18.95	4.11	23.02	2.00	40,345.14
U.K. (FTSE 100)	7,489.84	-0.31	-0.52	0.48	-1.55	0.51	1.57	9.97	3.96	1,990.99
Japan (topix)	2,342.69	-0.84	-1.67	-1.36	0.83	23.84	1.40	13.89	2.31	844,404.74
Emerging Markets										
MSCI EM Index	972.03	-0.84	-1.03	-1.53	2.02	1.64				
China (SSE Composite)	2,972.30	-1.67	-1.96	-1.89	-4.44	-3.79	1.36	12.00		44,025.04
India (Sensex)	69,296.14	0.63	2.69	3.44	5.27	13.90	4.48	22.55	1.17	135,153.29

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,637.88	0.02	-0.24	-0.24	-3.61	-8.97	1.41	14.03	3.40	43.33
Kuwait Premier Index	7,265.82	0.09	-0.35	-0.35	-3.39	-10.47	1.56	15.61	3.24	34.64
Kuwait Main Index	5,463.76	-0.24	0.19	0.19	-4.44	-2.38	1.00	9.71	4.08	8.68
Kuwait Sector										
Banking	1,591.24	0.13	-0.32	-0.32	-5.30	-11.30	1.63	15.87	2.87	27.20
Telecom	1,083.31	-0.17	-0.50	-0.50	1.03	-8.31	1.64	9.79	6.51	3.33
Industrials	900.07	0.11	-0.69	-0.69	-2.18	-16.57	1.00	14.01	3.12	3.16
Financial Services	1,207.29	-0.23	0.37	0.37	-2.51	-3.97	0.97	11.85	4.09	3.86
Real Estate	1,191.52	-0.15	-0.43	-0.43	1.36	-1.42	0.93	14.11	2.09	2.56
Basic Materials	790.86	-0.38	-2.00	-2.00	-5.07	-8.58	1.38	10.48	9.85	0.45
Health Care	482.15	0.00	0.00	0.00	1.48	4.40	1.75	12.10	1.73	0.24
Consumer Staples	599.01	0.05	-0.46	-0.46	0.51	24.81	1.37	12.61	2.06	0.18
Insurance	2,219.51	0.22	0.87	0.87	-0.07	43.12	1.25	7.71	4.22	0.89
Consumer Discretionary	1,520.81	-0.88	2.09	2.09	-2.34	2.29				
Energy	940.90	-0.44	-0.35	-0.35	-2.12	-17.36	0.75	10.10	5.37	0.20
Technology	609.64	4.75	0.00	0.00	9.68	-12.44	0.72			0.01
Utilities	463.16	0.57	-1.12	-1.12	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Tuesday, lifted by uncertainty over voluntary output cuts by the OPEC+ group of producers, tensions in the Middle East and some encouraging economic signals in Europe. Brent crude futures gained 8 cents, or 0.1%, to \$78.11 a barrel.

Kuwait Market

The market closed up by + 0.02 % at 6,636.64 value traded 42.1 million KD, Premier market value reached 24.1 million KD up by + 0.09 % at 7,265.82

KSA Market

The market closed down today by – 0.42 % at 11,143.83



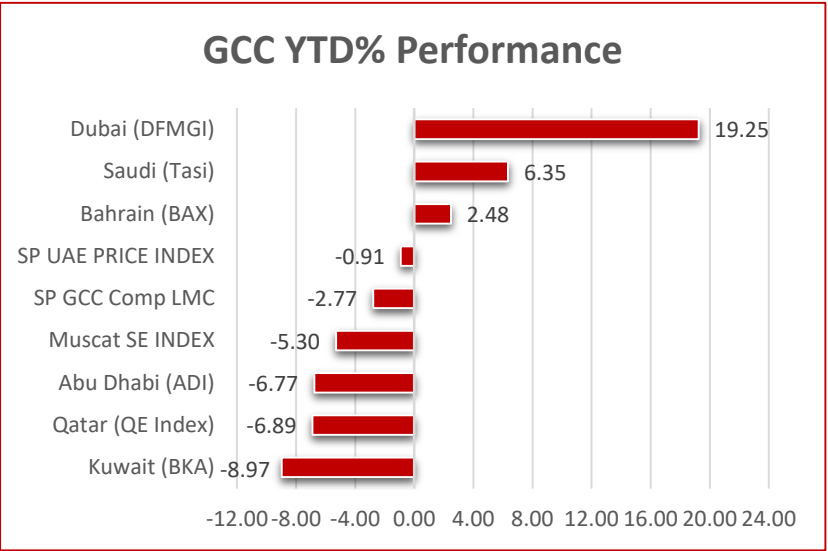
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.878	0.34	-0.79	-0.79	-3.09	-14.48	1.66	12.80	3.85	6.96
KFH	0.698	0.14	-0.14	-0.14	-4.77	-6.71	1.79	17.24	2.41	10.30
ZAIN	0.490	0.00	0.20	0.20	0.62	-12.97	1.70	9.80	7.14	2.12
BOUBYAN BANK	0.583	0.17	0.00	0.00	-3.48	-22.56	2.34	35.99	0.97	2.31
AGILITY	0.530	0.00	-1.85	-1.85	-5.02	-26.39	0.76	16.07	0.00	1.42
Saudi Arabia										
ARAMCO	33.05	-0.45	-0.45	-0.45	-5.57	13.26	5.17	16.82	4.59	7,996.82
SABIC	80.10	0.38	1.14	1.14	-2.91	-10.40	1.38	78.13	4.74	240.26
STC	38.25	0.26	-0.52	-0.52	1.73	4.51	2.42	13.88	4.18	191.22
AL-RAJHI BANK	75.30	-1.95	-1.44	-1.44	10.90	0.13	2.94	17.87	2.36	301.15
NCB	34.25	-1.01	-2.00	-2.00	4.42	-9.13	1.21	10.68	3.79	205.47
Abu Dhabi										
ETISALAT.AD	19.38	0.10	0.10	0.31	-5.19	-15.22	4.12	16.29	4.13	168.55
FAB.AD	13.62	-0.58	-0.58	-0.73	0.15	-20.35	1.25	10.59	3.82	150.47
EMIRATES NBD	17.80	1.71	1.71	1.14	0.00	36.92	1.07	5.38	3.37	112.44
DB ISLAMIC DB	5.58	0.72	0.72	1.09	-4.62	-2.11	0.93	7.07	5.38	40.40
EMAR.DU	7.54	-0.13	-0.13	-0.66	-6.22	28.67	0.90	6.96	3.32	66.65
Qatar										
QNB	15.800	0.77	0.64	0.64	2.60	-12.22	1.36	10.36	3.80	146.14
INDUSTREIS QAT	12.150	-1.62	-2.80	-2.80	-11.38	-5.15	1.90	15.75	9.05	73.61
QA ISLAMIC BK	18.530	-1.44	-2.47	-2.47	-0.16	-0.16	1.53	10.88	3.37	43.85
MASRAF AL RAYA	2.447	1.96	-1.57	-1.57	9.78	-22.83	0.93	19.35	4.09	22.79
MESAIEED PETRO	1.593	-1.36	-5.12	-5.12	-14.12	-25.11	1.19	17.48	6.91	20.04
Oman										
BANK MUSCAT	0.27	-1.46	-0.74	-0.74	-2.88	-1.82	0.88	10.23	5.56	2.03
OMANTEL	1.077	-1.73	-0.28	-0.28	8.79	17.07	1.26	29.79	3.02	0.81
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	0.276	-3.16	-3.16	-3.16	-10.68	-4.50	0.67	9.96	2.68	0.45
OMINVEST	0.460	-3.16	-2.13	-2.13	16.75	9.52	1.01	12.59	3.26	0.31

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

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.02 % The leading sector top performance indices today are Technology + 4.75 % Utilities + 0.57 % Insurance + 0.22 % respectively

KSA

Saudi Armco has a negative performance today by - 0.45 %, SABIC has a positive performance today by + 0.38 %. STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a negative performance today by – 1.95%

U.A.E

ETISALAT .AD has a positive performance today by + 0.10 %, FAB.AD has a negative performance today by – 0.58 %



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