



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 7th, 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)	11,225.35	0.46	0.43	0.43	1.53	7.13	3.09	18.60	3.28	11,058.43
Qatar (QE Index)	9,848.15	-0.24	-1.93	-1.93	-3.94	-7.80	1.19	11.72	4.95	521.25
Dubai (DFMGI)	3,951.52	-0.12	-0.91	-1.02	-5.09	18.45	1.43	8.87	4.49	573.02
Abu Dhabi (ADI)	9,400.75	-0.74	-1.45	-1.66	-3.93	-7.94	2.44	16.11	2.23	2,607.17
Bahrain (BAX)	1,942.35	-0.03	0.13	0.13	0.17	2.48	0.77	9.66	6.00	7.09
Muscat SE INDEX	4,594.41	-0.14	-1.37	-1.37	-1.60	-5.42	0.82	9.83	4.80	6.41
SP GCC Comp LMC	173.59	-0.26	-0.78	-0.78	-0.66	-2.90	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.40	-1.20	-2.71	-2.71	-6.54	-2.98				
Developed Markets										
MSCI World Index	3,047.21	0.32	0.21	0.78	6.80	17.08				
U.S. (S&P 500)	4,604.37	0.41	0.21	0.80	7.38	19.92	4.14	23.19	2.00	40,655.88
U.K. (FTSE 100)	7,554.47	0.54	0.33	1.35	-0.70	1.38	1.58	10.04	3.92	2,008.42
Japan (topix)	2,324.47	-1.50	-2.44	-2.12	0.05	22.88	1.38	13.78	2.33	837,563.57
Emerging Markets										
MSCI EM Index	975.01	0.50	-0.73	-1.23	2.33	1.95				
China (SSE Composite)	2,969.56	0.11	-2.05	-1.98	-4.53	-3.87	1.36	12.00		44,025.04
India (Sensex)	69,825.60	0.44	3.47	4.24	6.07	14.77	4.52	22.73	1.16	136,213.78

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,654.64	-0.01	0.01	0.01	-3.37	-8.74	1.41	14.07	3.39	43.43
Kuwait Premier Index	7,282.72	0.00	-0.12	-0.12	-3.17	-10.26	1.57	15.66	3.23	34.74
Kuwait Main Index	5,481.58	-0.05	0.52	0.52	-4.12	-2.06	1.00	9.73	4.08	8.69
Kuwait Sector										
Banking	1,595.26	0.21	-0.07	-0.07	-5.06	-11.07	1.63	15.92	2.86	27.29
Telecom	1,074.95	-1.10	-1.27	-1.27	0.25	-9.02	1.63	9.70	6.57	3.30
Industrials	904.16	-0.20	-0.24	-0.24	-1.73	-16.19	1.00	14.11	3.10	3.18
Financial Services	1,221.34	-0.30	1.54	1.54	-1.38	-2.86	0.98	11.98	4.05	3.89
Real Estate	1,192.73	0.10	-0.33	-0.33	1.46	-1.32	0.93	14.10	2.10	2.56
Basic Materials	781.97	-0.53	-3.10	-3.10	-6.14	-9.61	1.36	10.32	10.00	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	590.80	-2.32	-1.82	-1.82	-0.87	23.10	1.35	12.44	2.09	0.18
Insurance	2,245.27	0.99	2.04	2.04	1.09	44.78	1.26	7.82	4.16	0.90
Consumer Discretionary	1,524.01	-0.52	2.31	2.31	-2.13	2.50				
Energy	943.25	-0.01	-0.10	-0.10	-1.87	-17.15	0.74	10.08	5.38	0.20
Technology	609.64	0.00	0.00	0.00	9.68	-12.44	0.75			0.01
Utilities	463.16	0.00	-1.12	-1.12	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices reclaimed some ground on Thursday after tumbling to a six-month low the previous day but investors remained concerned about sluggish demand in the United States and China. Brent crude futures were up 65 cents, or 0.9%, to \$74.95 a barrel.

Kuwait Market

The market closed down by - 0.01 % at 6,655.40 value traded 58.6 million KD, Premier market value reached 45.5 million KD flat at 7,282.72

KSA Market

The market closed up today by + 0.46 % at 11,225.35



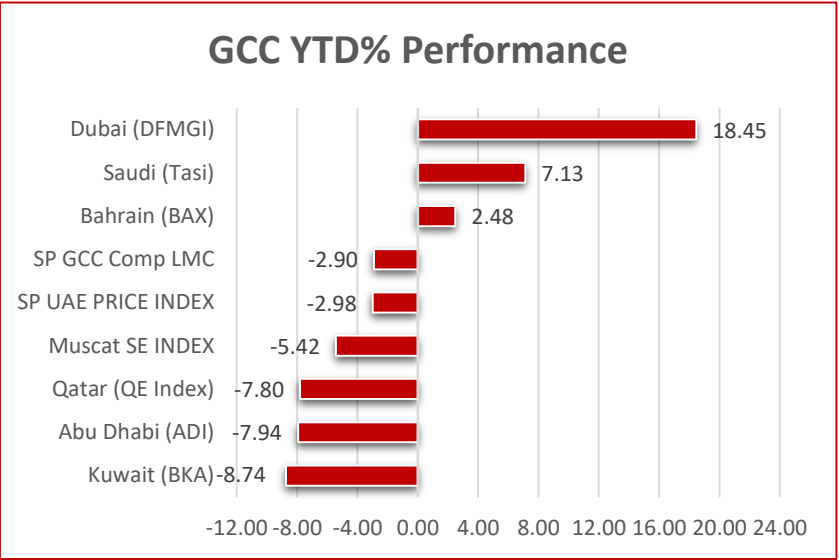
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.878	-0.23	-0.79	-0.79	-3.09	-14.48	1.66	12.80	3.85	6.96
KFH	0.701	0.57	0.29	0.29	-4.37	-6.31	1.80	17.31	2.40	10.35
ZAIN	0.488	-1.01	-0.20	-0.20	0.21	-13.32	1.69	9.76	7.17	2.11
BOUBYAN BANK	0.581	0.00	-0.34	-0.34	-3.81	-22.82	2.33	35.86	0.97	2.30
AGILITY	0.525	-1.13	-2.78	-2.78	-5.91	-27.08	0.75	15.92	0.00	1.40
Saudi Arabia										
ARAMCO	33.05	0.15	-0.45	-0.45	-5.57	13.26	5.17	16.82	4.59	7,998.10
SABIC	80.00	0.00	1.01	1.01	-3.03	-10.51	1.38	78.04	4.75	240.00
STC	38.15	0.13	-0.78	-0.78	1.46	4.23	2.41	13.84	4.19	190.75
AL-RAJHI BANK	76.40	1.46	0.00	0.00	12.52	1.60	2.99	18.13	2.32	305.60
NCB	34.70	1.02	-0.72	-0.72	5.79	-7.93	1.23	10.82	3.74	208.20
Abu Dhabi										
ETISALAT.AD	19.24	-2.81	-3.41	-3.21	-8.51	-18.20	3.97	15.72	4.28	162.63
FAB.AD	13.42	-1.19	-3.21	-3.35	-2.50	-22.46	1.22	10.31	3.92	146.49
EMIRATES NBD	17.45	-0.85	-0.29	-0.85	-1.97	34.23	1.05	5.27	3.44	110.22
DB ISLAMIC DB	5.61	0.72	1.26	1.63	-4.10	-1.58	0.94	7.11	5.35	40.62
EMAR.DU	7.38	-0.94	-2.25	-2.77	-8.21	25.94	0.88	6.81	3.39	65.23
Qatar										
QNB	15.770	1.09	0.45	0.45	2.40	-12.39	1.36	10.34	3.80	145.66
INDUSTREIS QAT	12.090	0.25	-3.28	-3.28	-11.82	-5.62	1.89	15.67	9.10	73.14
QA ISLAMIC BK	18.250	-0.54	-3.95	-3.95	-1.67	-1.67	1.51	10.72	3.42	43.12
MASRAF AL RAYA	2.382	-1.16	-4.18	-4.18	6.86	-24.88	0.91	18.84	4.20	22.15
MESAIEED PETRO	1.567	-0.82	-6.67	-6.67	-15.53	-26.33	1.17	17.19	7.02	19.69
Oman										
BANK MUSCAT	0.271	0.37	-0.37	-0.37	-2.52	-1.45	0.88	10.27	5.54	2.03
OMANTEL	1.080	-0.92	0.00	0.00	9.09	17.39	1.27	29.88	3.01	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	0.275	0.00	-3.51	-3.51	-11.00	-4.84	0.67	9.93	2.69	0.45
OMINVEST	0.460	0.00	-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
29-November-23	24.39%	14.80%	0.06%	1.97%	0.20%	5.38%	17.57%	13.13%	6.08%	5.19%
6-December-23	24.46%	14.87%	0.06%	1.97%	0.19%	5.42%	17.56%	13.15%	6.10%	5.22%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by - 0.01 % The leading sector bottom performance indices today are Consumer Staples - 2.32 % Telecom - 1.10 % Basic Materials - 0.53 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC has a flat performance today, STC has a positive performance today by + 0.13 %, Al Rajhi Bank has a positive performance today by + 1.46 %

U.A.E

ETISALAT .AD has a negative performance today by – 2.81 %, FAB.AD has a negative performance today by – 1.19 %



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