



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, November 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)	10,945.97	-0.03	0.85	2.39	-0.99	4.46	2.99	18.11	3.34	11,070.01
Qatar (QE Index)	10,120.05	-0.32	4.20	6.26	-1.29	-5.25	1.22	12.04	4.82	535.60
Dubai (DFMGI)	3,989.71	0.83	1.52	2.91	-4.18	19.59	1.45	9.41	4.44	574.30
Abu Dhabi (ADI)	9,551.47	-0.01	0.43	2.22	-2.39	-6.46	2.49	16.04	2.24	2,652.76
Bahrain (BAX)	1,923.95	0.17	0.32	-0.28	-0.78	1.51	0.76	9.15	6.05	7.02
Muscat SE INDEX	4,547.84	-0.29	1.24	0.05	-2.60	-6.37	0.80	9.32	4.93	6.25
SP GCC Comp LMC	172.65	-0.06	1.25	3.52	-1.27	-3.49	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.79	0.14	1.18	4.41	-4.73	-1.11				

Developed Markets										
MSCI World Index	2,889.44	-0.07	0.12	4.29	1.20	10.94				
U.S. (S&P 500)	4,365.98	0.28	0.46	4.40	2.11	14.04	3.93	22.21	2.09	38,576.40
U.K. (FTSE 100)	7,410.04	-0.10	-0.10	1.21	-2.60	-0.56	1.54	9.80	3.99	1,968.62
Japan (topix)	2,332.91	-1.17	0.45	3.51	0.41	23.32	1.36	13.55	2.26	843,661.78
Emerging Markets										
MSCI EM Index	968.91	-0.85	1.31	4.97	0.83	0.45				
China (SSE Composite)	3,057.27	-0.04	0.87	1.28	-1.71	-1.04	1.36	12.00		44,025.04
India (Sensex)	64,942.40	-0.03	0.90	1.67	-1.35	6.74	4.20	21.12	1.25	127,012.96

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,574.71	-0.51	0.63	0.66	-4.53	-9.84	1.40	14.27	3.42	43.12
Kuwait Premier Index	7,222.29	-0.60	0.70	1.11	-3.97	-11.01	1.56	16.06	3.23	34.67
Kuwait Main Index	5,340.18	-0.16	0.38	-1.03	-6.60	-4.58	0.97	9.51	4.18	8.46
Kuwait Sector										
Banking	1,588.75	-0.70	0.60	0.72	-5.45	-11.44	1.63	15.95	2.86	27.36
Telecom	1,062.38	0.48	0.81	0.86	-0.92	-10.08	1.60	9.72	6.68	3.25
Industrials	892.67	0.34	0.85	0.61	-2.98	-17.26	0.99	15.38	3.15	3.13
Financial Services	1,182.83	0.29	1.55	2.35	-4.49	-5.92	0.94	12.73	4.20	3.76
Real Estate	1,144.93	-1.63	0.96	-0.64	-2.61	-5.28	0.90	14.39	2.15	2.50
Basic Materials	761.20	0.00	1.34	0.50	-8.63	-12.01	1.33	9.91	10.27	0.43
Health Care	467.62	0.00	0.00	0.00	-1.58	1.25	1.70	12.01	1.78	0.23
Consumer Staples	584.64	0.35	-0.93	-0.06	-1.90	21.81	1.34	73.60	2.12	0.18
Insurance	2,185.75	-1.35	-1.50	-2.33	-1.59	40.94	1.24	7.37	4.21	0.89
Consumer Discretionary	1,483.04	-1.65	-0.96	-1.34	-4.76	-0.25				
Energy	908.05	-1.49	-3.07	0.71	-5.54	-20.24	0.73	9.92	5.51	0.19
Technology	589.27	0.00	0.00	-2.41	6.02	-15.36	0.73			0.01
Utilities	463.16	0.57	-0.56	1.15	-5.38	-6.38				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Tuesday, giving up most of the gains from the previous day, on concerns over weak demand in China, with investors focusing on trade data due later in the day to gauge demand from the world's second-largest oil consumer. Brent crude futures fell 23 cents, or 0.3%, to \$84.95 a barrel

Kuwait Market

The market closed down by – 0.51 % at 6,574.71 value traded 37.6 million KD, Premier market value reached 30.4 million KD down by - 0.60 % at 7,222.29

KSA Market

The market closed down today by - 0.03 % at 10,945.97



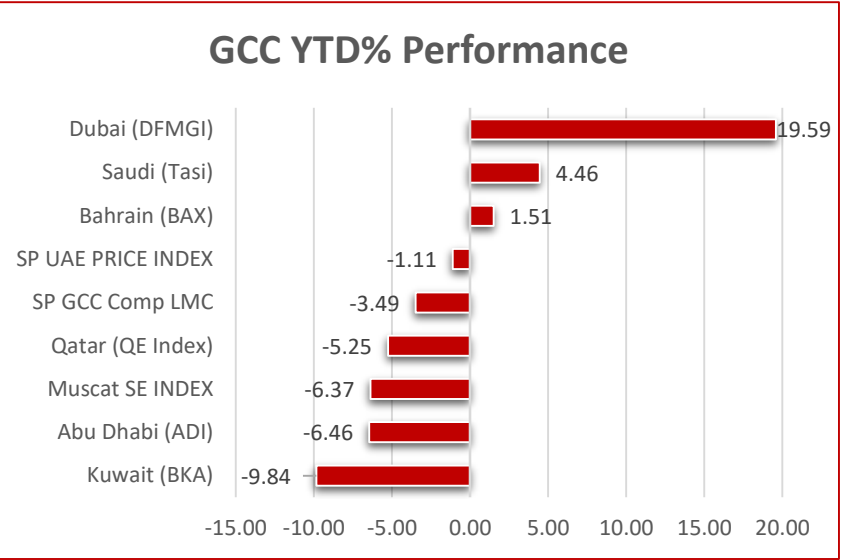
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.891	-0.45	1.14	1.60	-1.66	-13.21	1.69	12.99	3.79	7.06
KFH	0.692	-1.14	0.29	1.17	-5.59	-7.51	1.77	17.09	2.43	10.21
ZAIN	0.485	0.62	0.41	0.83	-0.41	-13.85	1.70	9.99	7.22	2.10
BOUBYAN BANK	0.587	-0.34	1.03	0.17	-2.81	-22.03	2.36	36.23	0.96	2.33
AGILITY	0.524	-0.38	0.77	-0.38	-6.09	-27.22	0.71	19.45	0.00	1.40
Saudi Arabia										
ARAMCO	33.60	0.45	1.36	0.90	-4.00	15.14	5.32	16.01	4.51	8,130.98
SABIC	79.00	-0.50	0.89	2.60	-4.24	-11.63	1.34	59.79	4.81	236.99
STC	37.95	0.00	-0.78	-1.17	0.93	3.69	2.40	13.77	4.22	189.74
AL-RAJHI BANK	70.60	0.28	0.86	5.22	3.98	-6.12	2.76	16.75	2.51	282.39
NCB	35.95	-0.69	-0.14	7.15	9.60	-4.61	1.27	11.21	3.61	215.69
Abu Dhabi										
ETISALAT.AD	19.82	-1.69	1.64	7.37	-3.03	-13.30	4.13	17.50	4.04	172.38
FAB.AD	13.32	1.22	0.76	5.05	-2.06	-22.11	1.22	10.35	3.90	147.16
EMIRATES NBD	17.80	1.14	1.14	5.01	0.00	36.92	1.07	5.38	3.37	112.44
DB ISLAMIC DB	5.60	0.90	3.32	3.70	-4.27	-1.75	0.94	7.10	5.36	40.55
EMAR.DU	6.98	0.29	2.20	4.33	-13.18	19.11	0.87	7.81	3.58	61.70
Qatar										
QNB	15.850	1.02	4.97	6.45	2.92	-11.94	1.36	10.39	3.79	146.35
INDUSTREIS QAT	13.130	-1.65	5.04	7.45	-4.23	2.50	2.06	17.02	8.38	79.41
QA ISLAMIC BK	18.550	0.00	3.63	6.61	-0.05	-0.05	1.53	10.90	3.37	43.82
MASRAF AL RAYA	2.360	-1.13	11.53	12.38	5.88	-25.58	0.90	18.66	4.24	21.94
MESAIEED PETRO	1.617	-0.98	1.38	1.70	-12.83	-23.98	1.20	17.74	6.80	20.31
Oman										
BANK MUSCAT	0.253	-0.39	-0.78	-1.94	-8.99	-8.00	0.82	9.59	5.93	1.90
OMANTEL	1.020	0.00	0.00	-0.97	3.03	10.87	1.22	32.99	3.19	0.76
BANK DHOFAR	0.170	0.00	6.25	6.25	0.00	-2.86	0.70	17.54	2.94	0.51
NAT BANK OF OMAN	0.295	-0.67	-1.34	-2.96	-4.53	2.08	0.72	10.65	2.51	0.48
OMINVEST	0.401	0.00	0.25	-2.20	1.78	-4.52	0.89	5.89	3.74	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 down today by - 0.51 % The leading sector bottom performance indices today are Consumer Discretionary -1.65 % Real Estate – 1.63 % Energy – 1.49 % respectively

KSA

Saudi Armco has a positive performance today by + 0.45 %, SABIC has a negative performance today by – 0.50 %, STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 0.28 %

U.A.E

ETISALAT .AD has a negative performance today by - 1.69 %, FAB.AD has a positive performance today by + 1.22 %



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