

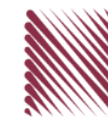


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, November 8th 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)	10,928.76	-0.16	0.69	2.23	-1.15	4.30	3.00	18.26	3.34	11,049.55
Qatar (QE Index)	10,038.27	-0.81	3.35	5.40	-2.08	-6.02	1.21	11.94	4.86	531.93
Dubai (DFMGI)	3,965.21	-0.61	0.90	2.27	-4.76	18.86	1.44	9.35	4.47	570.73
Abu Dhabi (ADI)	9,545.68	-0.06	0.37	2.16	-2.45	-6.52	2.49	16.39	2.19	2,646.08
Bahrain (BAX)	1,925.29	0.07	0.39	-0.21	-0.71	1.58	0.76	9.16	6.04	7.02
Muscat SE INDEX	4,555.08	0.16	1.40	0.21	-2.44	-6.22	0.80	9.34	4.92	6.27
SP GCC Comp LMC	172.53	-0.25	0.99	3.26	-1.51	-3.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.98	-0.30	0.88	4.11	-5.01	-1.40				
Developed Markets										
MSCI World Index	2,887.39	0.04	0.16	4.33	1.23	10.98				
U.S. (S&P 500)	4,378.38	0.10	0.56	4.51	2.21	14.15	3.94	22.24	2.08	38,693.45
U.K. (FTSE 100)	7,401.72	-0.11	-0.22	1.09	-2.71	-0.67	1.54	9.79	3.99	1,966.41
Japan (topix)	2,305.95	-1.16	-0.71	2.32	-0.75	21.90	1.35	13.39	2.29	834,217.10
Emerging Markets										
MSCI EM Index	960.66	-0.29	1.02	4.67	0.54	0.16				
China (SSE Composite)	3,052.37	-0.16	0.71	1.11	-1.87	-1.19	1.36	12.00		44,025.04
India (Sensex)	64,975.61	0.05	0.95	1.72	-1.30	6.80	4.20	21.13	1.25	127,178.76
Kuwait										
Kuwait All Share Index	6,557.77	-0.26	0.37	0.40	-4.78	-10.07	1.39	14.21	3.43	42.93
Kuwait Premier Index	7,195.94	-0.36	0.33	0.75	-4.32	-11.33	1.55	15.97	3.25	34.48
Kuwait Main Index	5,348.07	0.15	0.53	-0.89	-6.46	-4.44	0.97	9.50	4.19	8.45
Kuwait Sector										
Banking	1,583.72	-0.32	0.28	0.40	-5.75	-11.72	1.62	15.85	2.88	27.19
Telecom	1,052.12	-0.97	-0.16	-0.11	-1.88	-10.95	1.61	9.77	6.65	3.26
Industrials	893.05	0.04	0.90	0.65	-2.94	-17.22	0.99	15.44	3.14	3.14
Financial Services	1,179.96	-0.24	1.30	2.10	-4.72	-6.15	0.94	12.78	4.19	3.77
Real Estate	1,157.60	1.11	2.08	0.46	-1.53	-4.23	0.89	14.16	2.18	2.46
Basic Materials	763.93	0.36	1.70	0.86	-8.30	-11.70	1.33	9.91	10.27	0.43
Health Care	467.32	-0.06	-0.06	-0.06	-1.64	1.18	1.70	12.01	1.78	0.23
Consumer Staples	588.75	0.70	-0.24	0.64	-1.21	22.67	1.34	73.89	2.11	0.18
Insurance	2,188.25	0.11	-1.39	-2.22	-1.48	41.10	1.22	7.28	4.27	0.88
Consumer Discretionary	1,448.00	-2.36	-3.30	-3.67	-7.01	-2.61				
Energy	931.27	2.56	-0.59	3.28	-3.12	-18.20	0.72	9.75	5.59	0.19
Technology	596.55	1.24	1.24	-1.20	7.33	-14.32	0.73			0.01
Utilities	465.79	0.57	0.00	1.73	-4.84	-5.85				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

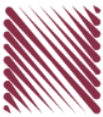
Oil prices remained under pressure on Wednesday after sliding to their lowest in more than three months in the previous session, slipping further on concern over waning demand in the United States and China. Brent crude futures dipped 54 cents to \$81.07 a barrel.

Kuwait Market

The market closed down by – 0.26 % at 6,557.77 value traded 34.0 million KD, Premier market value reached 25.6 million KD down by – 0.36 % at 7,195.94

KSA Market

The market closed down today by - 0.16 % at 10,928.76

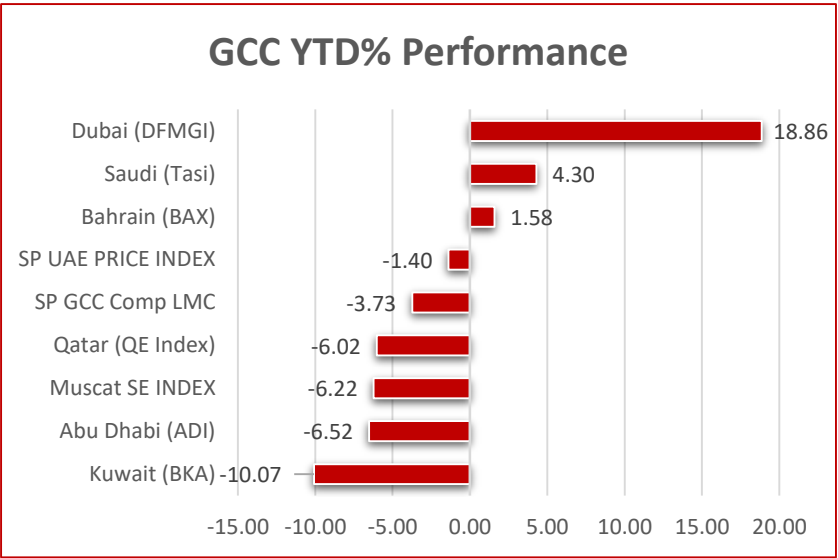


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.885	-0.67	0.45	0.91	-2.32	-13.80	1.68	12.90	3.82	7.02
KFH	0.689	-0.43	-0.14	0.73	-6.00	-7.91	1.77	17.02	2.44	10.18
ZAIN	0.478	-1.44	-1.04	-0.62	-1.85	-15.10	1.67	9.85	7.32	2.07
BOUBYAN BANK	0.589	0.34	1.38	0.51	-2.48	-21.76	2.37	36.36	0.96	2.34
AGILITY	0.522	-0.38	0.38	-0.76	-6.45	-27.50	0.70	19.38	0.00	1.40
Saudi Arabia										
ARAMCO	33.55	-0.15	1.21	0.75	-4.14	14.97	5.25	17.08	4.52	8,118.67
SABIC	77.80	-1.52	-0.64	1.04	-5.70	-12.98	1.32	58.88	4.88	233.39
STC	38.20	0.66	-0.13	-0.52	1.60	4.37	2.42	13.86	4.19	190.99
AL-RAJHI BANK	71.00	0.57	1.43	5.81	4.57	-5.59	2.78	16.85	2.50	283.98
NCB	35.45	-1.39	-1.53	5.66	8.08	-5.94	1.25	11.06	3.66	212.69
Abu Dhabi										
ETISALAT.AD	19.96	0.71	2.36	8.13	-2.35	-12.69	4.16	17.62	4.01	173.59
FAB.AD	13.38	0.45	1.21	5.52	-1.62	-21.75	1.23	10.40	3.89	147.82
EMIRATES NBD	17.70	-0.56	0.57	4.42	-0.56	36.15	1.06	5.35	3.39	111.80
DB ISLAMIC DB	5.55	-0.89	2.40	2.78	-5.13	-2.63	0.93	7.04	5.41	40.19
EMAR.DU	6.84	-2.01	0.15	2.24	-14.93	16.72	0.85	7.65	3.65	60.46
Qatar										
QNB	15.900	0.32	5.30	6.78	3.25	-11.67	1.37	10.42	3.77	146.90
INDUSTREIS QAT	12.940	-1.45	3.52	5.89	-5.62	1.01	2.03	16.77	8.50	78.31
QA ISLAMIC BK	18.170	-2.05	1.51	4.43	-2.10	-2.10	1.50	10.67	3.44	42.95
MASRAF AL RAYA	2.330	-1.27	10.11	10.95	4.53	-26.52	0.89	18.43	4.29	21.67
MESAIEED PETRO	1.604	-0.80	0.56	0.88	-13.53	-24.59	1.19	17.60	6.86	20.16
Oman										
BANK MUSCAT	0.253	0.00	-0.78	-1.94	-8.99	-8.00	0.82	9.59	5.93	1.90
OMANTEL	1.030	0.98	0.98	0.00	4.04	11.96	1.23	33.31	3.16	0.77
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	0.00	-1.34	-2.96	-4.53	2.08	0.72	10.65	2.51	0.48
OMINVEST	0.410	2.24	2.50	0.00	4.06	-2.38	0.91	6.02	3.66	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by – 0.26 % The leading sector bottom performance indices today are Consumer Discretionary -2.36 % Telecom – 0.97 % Banking – 0.32 % respectively

KSA
Saudi Armco has a negative performance today by - 0.15 %, SABIC has a negative performance today by – 1.52 %, STC has a positive performance today by 0.66%, Al Rajhi Bank has a positive performance today by + 0.57 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.71 %, FAB.AD has a positive performance today by + 0.45 %



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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