



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 9th 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)	10,840.76	-0.81	-0.12	1.41	-1.95	3.46	2.98	17.98	3.37	11,013.27
Qatar (QE Index)	9,977.23	-0.61	2.73	4.76	-2.68	-6.59	1.20	11.87	4.89	528.81
Dubai (DFMGI)	3,969.28	1.01	1.00	2.38	-4.67	18.98	1.45	9.36	4.46	571.89
Abu Dhabi (ADI)	9,548.88	0.21	0.40	2.19	-2.42	-6.49	2.49	16.38	2.19	2,667.12
Bahrain (BAX)	1,931.66	0.33	0.72	0.12	-0.39	1.92	0.76	9.19	6.02	7.03
Muscat SE INDEX	4,539.16	-0.35	1.04	-0.14	-2.78	-6.55	0.80	9.31	4.93	6.25
SP GCC Comp LMC	171.40	0.12	0.58	2.83	-1.92	-4.13	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.72	0.54	0.99	4.22	-4.91	-1.29				
Developed Markets										
MSCI World Index	2,900.76	0.76	0.59	4.77	1.67	11.45				
U.S. (S&P 500)	4,415.24	1.56	1.31	5.28	2.97	15.00	3.97	22.48	2.07	39,008.29
U.K. (FTSE 100)	7,360.55	-1.28	-0.77	0.53	-3.25	-1.22	1.53	9.75	4.02	1,955.32
Japan (topix)	2,336.72	0.07	0.62	3.68	0.57	23.52	1.36	13.84	2.28	844,721.64
Emerging Markets										
MSCI EM Index	948.32	-0.83	0.01	3.62	-0.47	-0.84				
China (SSE Composite)	3,038.97	-0.47	0.27	0.67	-2.30	-1.63	1.36	12.00		44,025.04
India (Sensex)	64,904.68	0.11	0.84	1.61	-1.40	6.68	4.19	21.10	1.25	126,873.36
Kuwait										
Kuwait All Share Index	6,590.72	0.50	0.88	0.90	-4.30	-9.62	1.40	14.16	3.42	43.02
Kuwait Premier Index	7,233.76	0.53	0.86	1.28	-3.82	-10.87	1.56	15.86	3.25	34.53
Kuwait Main Index	5,370.28	0.42	0.94	-0.48	-6.07	-4.05	0.98	9.57	4.17	8.49
Kuwait Sector										
Banking	1,594.10	0.66	0.94	1.06	-5.13	-11.14	1.63	15.90	2.87	27.27
Telecom	1,060.48	0.79	0.63	0.68	-1.10	-10.24	1.60	9.75	6.66	3.26
Industrials	894.08	0.12	1.01	0.77	-2.83	-17.13	0.99	15.42	3.13	3.14
Financial Services	1,174.01	-0.50	0.79	1.59	-5.20	-6.62	0.94	11.60	4.22	3.74
Real Estate	1,165.10	0.65	2.74	1.11	-0.89	-3.61	0.90	14.41	2.14	2.50
Basic Materials	761.67	-0.30	1.40	0.56	-8.57	-11.96	1.33	9.92	10.26	0.43
Health Care	467.32	0.00	-0.06	-0.06	-1.64	1.18	1.69	12.00	1.78	0.23
Consumer Staples	584.64	-0.70	-0.93	-0.06	-1.90	21.81	1.34	73.89	2.11	0.18
Insurance	2,233.80	2.08	0.66	-0.18	0.57	44.04	1.25	7.44	4.18	0.90
Consumer Discretionary	1,450.82	0.19	-3.11	-3.48	-6.83	-2.42				
Energy	930.28	-0.11	-0.69	3.17	-3.22	-18.29	0.73	10.03	5.46	0.19
Technology	582.00	-2.44	-1.23	-3.61	4.71	-16.41	0.72			0.01
Utilities	460.53	-1.13	-1.13	0.58	-5.91	-6.91				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged up on Thursday as markets shrugged off deflationary indicators in China and looked for further clues on the status of demand from the world's two biggest oil consumers. Brent crude futures rose 42 cents, or 0.5%, to \$79.96 a barrel.

Kuwait Market

The market closed up by + 0.50 % at 6,590.72 value traded 33.3 million KD, Premier market value reached 25.2 million KD up by + 0.53 % at 7,233.76

KSA Market

The market closed down today by - 0.81 % at 10,840.76



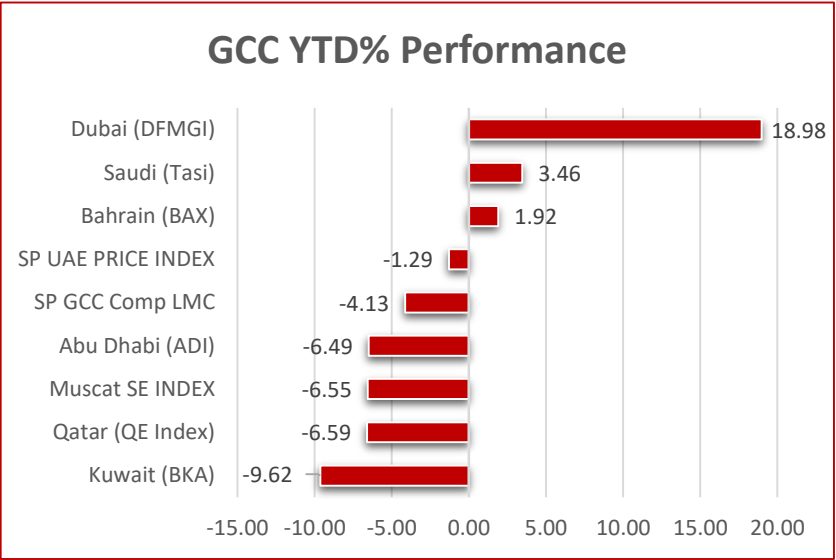
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.890	0.56	1.02	1.48	-1.77	-13.31	1.68	12.97	3.80	7.06
KFH	0.694	0.73	0.58	1.46	-5.32	-7.24	1.78	17.14	2.42	10.25
ZAIN	0.481	0.63	-0.41	0.00	-1.23	-14.56	1.68	9.91	7.28	2.08
BOUBYAN BANK	0.599	1.70	3.10	2.22	-0.83	-20.43	2.41	36.98	0.94	2.37
AGILITY	0.523	0.19	0.58	-0.57	-6.27	-27.36	0.71	19.41	0.00	1.40
Saudi Arabia										
ARAMCO	33.50	-0.15	1.06	0.60	-4.29	14.80	5.24	17.05	4.52	8,107.00
SABIC	77.80	0.00	-0.64	1.04	-5.70	-12.98	1.32	55.87	4.88	233.40
STC	38.20	0.00	-0.13	-0.52	1.60	4.37	2.42	13.86	4.19	191.00
AL-RAJHI BANK	70.80	-0.28	1.14	5.51	4.27	-5.85	2.77	16.80	2.51	283.20
NCB	35.05	-1.13	-2.64	4.47	6.86	-7.00	1.24	10.93	3.70	210.30
Abu Dhabi										
ETISALAT.AD	19.50	0.62	0.62	6.28	-4.01	-14.17	4.09	17.32	4.08	170.63
FAB.AD	13.40	-0.75	0.61	4.89	-2.21	-22.22	1.22	10.34	3.91	146.93
EMIRATES NBD	17.80	-0.84	0.28	4.13	-0.84	35.77	1.06	5.34	3.40	111.49
DB ISLAMIC DB	5.53	0.18	2.21	2.59	-5.30	-2.81	0.93	7.02	5.42	40.11
EMAR.DU	6.80	4.41	3.95	6.13	-11.69	21.16	0.88	7.95	3.52	62.76
Qatar										
QNB	15.880	-0.13	5.17	6.65	3.12	-11.78	1.37	10.41	3.78	146.67
INDUSTREIS QAT	12.880	-0.46	3.04	5.40	-6.05	0.55	2.02	16.70	8.54	77.92
QA ISLAMIC BK	18.000	-0.94	0.56	3.45	-3.02	-3.02	1.49	10.57	3.47	42.53
MASRAF AL RAYA	2.328	-0.09	10.02	10.86	4.44	-26.58	0.89	18.41	4.30	21.65
MESAIEED PETRO	1.600	-0.25	0.31	0.63	-13.75	-24.78	1.19	17.56	6.88	20.10
Oman										
BANK MUSCAT	0.253	0.00	-0.78	-1.94	-8.99	-8.00	0.82	9.59	5.93	1.90
OMANTEL	1.018	-1.17	-0.20	-1.17	2.83	10.65	1.22	32.92	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	0.294	-0.34	-1.67	-3.29	-4.85	1.73	0.72	10.61	2.52	0.48
OMINVEST	0.400	-2.44	0.00	-2.44	1.52	-4.76	0.89	5.88	3.75	0.27

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-November-23	24.23%	14.64%	0.07%	2.00%	0.22%	5.39%	17.53%	12.98%	6.04%	5.10%
8-November-23	24.27%	14.60%	0.06%	1.99%	0.22%	5.40%	17.54%	12.97%	6.02%	5.12%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.50 % The leading sector bottom performance indices today are Technology -2.44 % Utilities – 1.13 % Consumer Staples – 0.70 % respectively

KSA

Saudi Armco has a negative performance today by - 0.15 %, SABIC has a flat performance today, STC has a flat performance today, Al Rajhi Bank has a negative performance today by - 0.28 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.62 %, FAB.AD has a negative performance today by - 0.75 %



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