

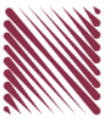


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, January 14, 2024





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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)	12,060.03	-0.46	-0.46	0.77	0.77	0.77	3.34	20.05	2.98	11,256.90
Qatar (QE Index)	10,509.85	0.42	0.42	-2.96	-2.96	-2.96	1.26	12.48	4.64	544.74
Dubai (DFMGI)	4,104.11	-0.34	0.39	1.09	1.09	1.09	1.49	9.24	4.31	587.88
Abu Dhabi (ADI)	9,791.16	-0.54	1.35	2.23	2.23	2.23	3.15			2,750.84
Bahrain (BAX)	1,983.18	-0.16	-0.16	0.59	0.59	0.59	0.79	9.97	5.84	7.25
Muscat SE INDEX	4,629.41	0.48	0.48	2.56	2.56	2.56	0.82	10.56	4.64	6.43
SP GCC Comp LMC	187.53	-0.21	-0.21	1.39	1.39	1.39	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.68	0.00	0.00	2.06	2.06	2.06				
Developed Markets										
MSCI World Index	3,168.31	0.35	1.53	-0.03	-0.03	-0.03				
U.S. (S&P 500)	4,783.83	0.08	1.84	0.29	0.29	0.29	4.26	24.22	1.94	42,396.29
U.K. (FTSE 100)	7,624.93	0.64	-0.84	-1.40	-1.40	-1.40	1.61	10.13	3.87	2,024.84
Japan (topix)	2,494.23	0.46	4.21	5.40	5.40	5.40	1.49	14.78	2.17	896,810.06
Emerging Markets										
MSCI EM Index	996.30	0.16	-0.58	-2.68	-2.68	-2.68				
China (SSE Composite)	2,881.98	-0.16	-1.61	-3.12	-3.12	-3.12	1.36	12.00		44,025.04
India (Sensex)	72,568.45	1.18	0.75	0.45	0.45	0.45	4.65	23.47	1.12	142,429.66

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,211.32	-0.04	-0.04	5.78	5.78	5.78	1.52	15.17	3.15	46.73
Kuwait Premier Index	7,922.17	-0.16	-0.16	5.95	5.95	5.95	1.69	16.94	2.99	37.54
Kuwait Main Index	5,855.24	0.42	0.42	5.13	5.13	5.13	1.07	10.31	3.86	9.19
Kuwait Sector										
Banking	1,749.32	-0.18	-0.18	6.18	6.18	6.18	1.77	17.29	2.64	29.65
Telecom	1,142.51	-0.49	-0.49	3.38	3.38	3.38	1.74	10.36	6.15	3.52
Industrials	968.25	0.26	0.26	6.65	6.65	6.65	1.08	14.84	2.95	3.34
Financial Services	1,319.83	0.50	0.50	8.88	8.88	8.88	1.05	12.93	3.77	4.18
Real Estate	1,244.33	0.37	0.37	2.59	2.59	2.59	0.96	14.61	2.03	2.66
Basic Materials	789.87	-0.16	-0.16	5.89	5.89	5.89	1.38	11.46	9.88	0.45
Health Care	477.91	0.00	0.00	-0.88	-0.88	-0.88	1.73	11.99	1.74	0.24
Consumer Staples	668.51	-2.40	-2.40	1.51	1.51	1.51	1.57	14.67	1.80	0.21
Insurance	2,332.01	0.97	0.97	1.71	1.71	1.71	1.30	8.02	4.04	0.93
Consumer Discretionary	1,687.16	0.50	0.50	5.19	5.19	5.19				
Energy	964.09	0.12	0.12	1.59	1.59	1.59	0.76	10.29	5.27	0.20
Technology	698.40	14.56	14.56	20.76	20.76	20.76	0.75			0.01
Utilities	473.68	-0.55	-0.55	4.05	4.05	4.05				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose after Britain and the United States carried out military strikes against targets in Houthi-controlled areas of Yemen, as tensions in the Red Sea mount further. Brent futures spiked more than 4% Friday morning to hit their highest levels since Dec. 27. U.S. crude oil jumped to \$75.25 a barrel while the global benchmark touched \$80.75.

Kuwait Market

The market closed down by - 0.04 % at 7,211.32 value traded 71.2 million KD, Premier market value reached 38.6 million KD down by - 0.16 % at 7,922.17

KSA Market

The market closed down today by – 0.46 % at 12,060.03

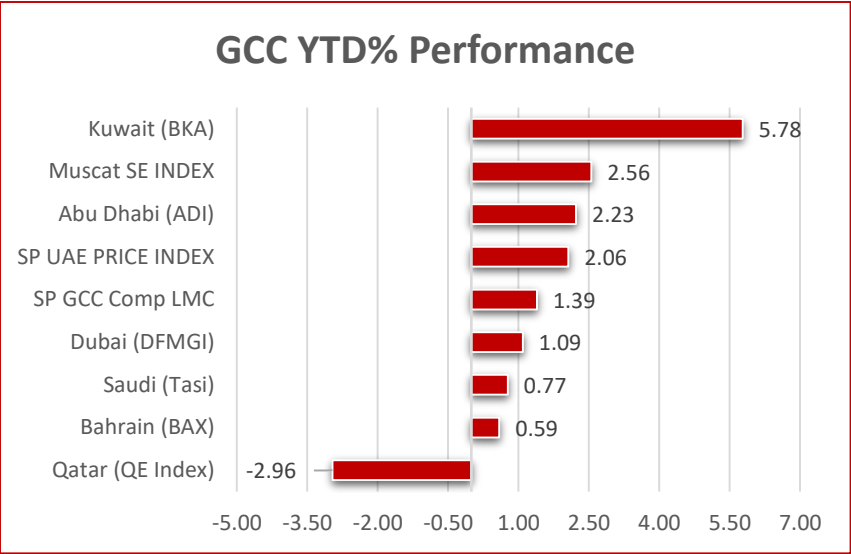


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.955	0.53	0.53	6.82	6.82	6.82	1.81	13.92	3.54	7.57
KFH	0.774	-0.51	-0.51	6.61	6.61	6.61	1.98	19.12	2.17	11.43
ZAIN	0.521	-0.76	-0.76	2.76	2.76	2.76	1.81	10.42	6.72	2.25
BOUBYAN BANK	0.632	0.00	0.00	5.33	5.33	5.33	2.54	39.01	0.90	2.50
AGILITY	0.548	-0.36	-0.36	7.66	7.66	7.66	0.79	16.62	0.00	1.47
Saudi Arabia										
ARAMCO	32.85	0.00	0.00	-0.45	-0.45	-0.45	5.14	16.72	4.61	7,949.70
SABIC	80.00	0.13	0.13	-4.19	-4.19	-4.19	1.38	78.04	4.25	240.00
STC	41.05	-0.24	-0.24	1.61	1.61	1.61	2.60	14.90	3.90	205.25
AL-RAJHI BANK	86.40	-0.69	-0.69	-0.12	-0.12	-0.12	3.38	20.50	2.05	345.60
NCB	42.25	-0.82	-0.82	9.31	9.31	9.31	1.49	13.18	3.07	253.50
Abu Dhabi										
ETISALAT.AD	19.92	-0.20	1.84	1.43	1.43	1.43	4.23	16.74	4.02	173.24
FAB.AD	15.34	-2.04	10.20	9.89	9.89	9.89	1.41	11.92	3.39	169.47
EMIRATES NBD	17.45	0.00	-0.57	0.87	0.87	0.87	1.05	5.27	3.44	110.22
DB ISLAMIC DB	5.83	0.34	0.87	1.92	1.92	1.92	0.98	7.39	5.15	42.21
EMAR.DU	7.78	0.00	1.17	-1.77	-1.77	-1.77	0.92	7.18	3.21	68.77
Qatar										
QNB	16.340	-0.18	-0.18	-1.15	-1.15	-1.15	1.38	10.51	3.67	150.92
INDUSTREIS QAT	12.580	0.56	0.56	-3.82	-3.82	-3.82	1.97	16.31	8.74	76.11
QA ISLAMIC BK	20.250	0.20	0.20	-5.81	-5.81	-5.81	1.67	11.90	3.09	47.85
MASRAF AL RAYA	2.569	0.67	0.67	-3.24	-3.24	-3.24	0.98	20.32	3.89	23.89
MESAIEED PETRO	1.820	0.00	0.00	1.79	1.79	1.79	1.35	19.97	6.04	22.86
Oman										
BANK MUSCAT	0.269	-0.37	-0.37	1.89	1.89	1.89	0.88	10.19	5.58	2.02
OMANTEL	1.070	0.66	0.66	0.94	0.94	0.94	1.26	29.60	3.04	0.80
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.66	16.51	3.13	0.48
NAT BANK OF OMAN	0.286	0.00	0.00	2.14	2.14	2.14	0.70	10.32	2.59	0.47
OMINVEST	0.470	0.00	0.00	11.90	11.90	11.90	1.03	12.87	3.19	0.31

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
3-January-24	24.24%	14.81%	0.06%	2.02%	0.19%	5.55%	17.69%	12.94%	6.14%	5.52%
10-January-24	24.26%	14.71%	0.06%	2.12%	0.19%	5.61%	17.77%	12.97%	6.16%	5.52%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.04 % The leading sector bottom performance indices today are Consumer services -2.4 % Utilities -0.55 % Telecom -0.49 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by + 0.13 % STC has a negative performance today by - 0.24 %, Al Rajhi Bank has a negative performance today by - 0.69 %.

U.A.E

ETISALAT .AD have negative performance today by -0.20 %, FAB.AD have negative performance today by -2.04 %



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