

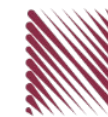


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 15, 2024





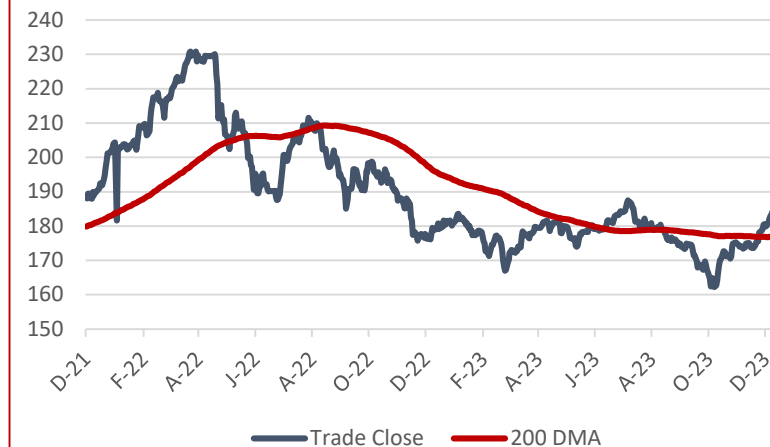
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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,122.11	0.51	0.05	1.29	1.29	1.29	3.34	20.06	2.97	11,168.15
Qatar (QE Index)	10,533.74	0.23	0.65	-2.74	-2.74	-2.74	1.26	12.51	4.63	544.17
Dubai (DFMGI)	4,101.29	-0.07	-0.07	1.02	1.02	1.02	1.49	9.24	4.31	588.30
Abu Dhabi (ADI)	9,777.67	-0.14	-0.14	2.09	2.09	2.09	3.15	18.39	1.60	2,743.75
Bahrain (BAX)	1,985.51	0.12	-0.04	0.71	0.71	0.71	0.79	9.97	5.84	7.26
Muscat SE INDEX	4,612.66	-0.36	0.12	2.18	2.18	2.18	0.81	10.53	4.65	6.41
SP GCC Comp LMC	188.65	0.60	0.39	2.00	2.00	2.00	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.63	-0.04	-0.04	2.02	2.02	2.02				

Developed Markets										
MSCI World Index	3,165.14	-0.10	-0.10	-0.13	-0.13	-0.13				
U.S. (S&P 500)	4,783.83	0.00	0.00	0.29	0.29	0.29	4.26	24.22	1.94	42,396.29
U.K. (FTSE 100)	7,594.91	-0.39	-0.39	-1.79	-1.79	-1.79	1.60	10.09	3.89	2,016.98
Japan (topix)	2,524.60	1.22	1.22	6.69	6.69	6.69	1.50	14.96	2.15	907,490.25
Emerging Markets										
MSCI EM Index	995.16	-0.11	-0.11	-2.79	-2.79	-2.79				
China (SSE Composite)	2,886.29	0.15	0.15	-2.98	-2.98	-2.98	1.36	12.00		44,025.04
India (Sensex)	73,327.94	1.05	1.05	1.51	1.51	1.51	4.70	23.72	1.11	143,900.64

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,263.54	0.72	0.68	6.55	6.55	6.55	1.52	15.16	3.16	46.72
Kuwait Premier Index	7,986.99	0.82	0.66	6.82	6.82	6.82	1.69	16.92	2.99	37.49
Kuwait Main Index	5,876.68	0.37	0.79	5.51	5.51	5.51	1.07	10.35	3.84	9.23
Kuwait Sector										
Banking	1,763.58	0.82	0.63	7.05	7.05	7.05	1.77	17.26	2.64	29.60
Telecom	1,148.29	0.51	0.01	3.90	3.90	3.90	1.73	10.31	6.18	3.51
Industrials	972.38	0.43	0.69	7.10	7.10	7.10	1.08	14.87	2.94	3.35
Financial Services	1,329.21	0.71	1.21	9.65	9.65	9.65	1.05	13.02	3.75	4.20
Real Estate	1,250.78	0.52	0.89	3.12	3.12	3.12	0.97	14.66	2.02	2.67
Basic Materials	791.62	0.22	0.06	6.13	6.13	6.13	1.38	11.44	9.90	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	674.33	0.87	-1.55	2.39	2.39	2.39	1.53	14.33	1.84	0.20
Insurance	2,372.75	1.75	2.73	3.49	3.49	3.49	1.31	8.04	4.00	0.94
Consumer Discretionary	1,697.27	0.60	1.10	5.82	5.82	5.82				
Energy	961.33	-0.29	-0.17	1.30	1.30	1.30	0.76	10.30	5.27	0.20
Technology	763.87	9.37	25.30	32.08	32.08	32.08	0.86			0.01
Utilities	468.42	-1.11	-1.66	2.89	2.89	2.89				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices slipped on Monday with traders watching out for supply disruption risk in the Middle East following strikes by U.S. and British forces to stop Houthi militia in Yemen from attacking ships in the Red Sea. Brent crude futures fell 31 cents, or 0.4%, to \$77.98 a barrel.

Kuwait Market

The market closed up by + 0.72 % at 7,263.54 value traded 73.2 million KD, Premier market value reached 51.1 million KD up by + 0.82 % at 7,986.99

KSA Market

The market closed up today by + 0.51 % at 12,122.11



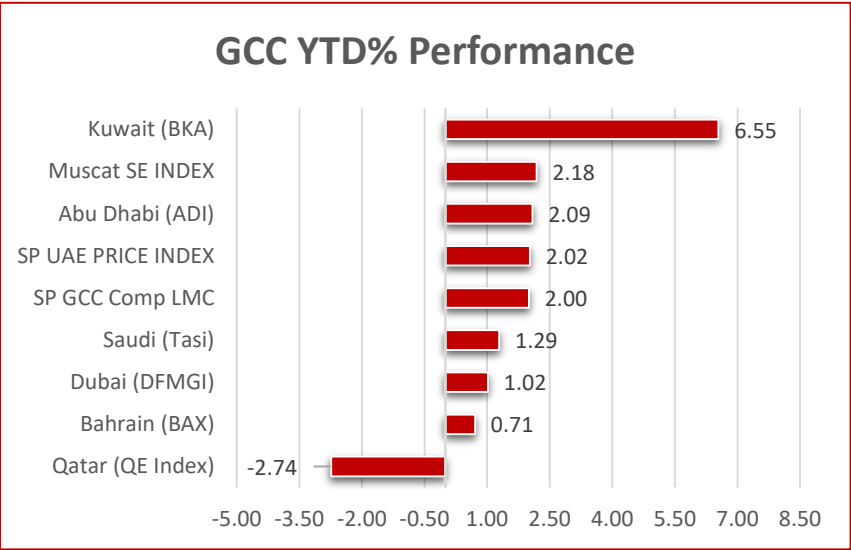
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.970	1.57	2.11	8.50	8.50	8.50	1.84	14.14	3.49	7.69
KFH	0.779	0.65	0.13	7.30	7.30	7.30	2.00	19.24	2.16	11.51
ZAIN	0.521	0.00	-0.76	2.76	2.76	2.76	1.81	10.42	6.72	2.26
BOUBYAN BANK	0.642	1.58	1.58	7.00	7.00	7.00	2.58	39.63	0.88	2.55
AGILITY	0.555	1.28	0.91	9.04	9.04	9.04	0.80	16.83	0.00	1.49
Saudi Arabia										
ARAMCO	32.40	-1.37	-1.37	-1.82	-1.82	-1.82	5.07	16.49	4.68	7,840.80
SABIC	79.90	-0.12	0.00	-4.31	-4.31	-4.31	1.38	77.94	4.26	239.70
STC	41.30	0.61	0.36	2.23	2.23	2.23	2.61	14.99	3.87	206.50
AL-RAJHI BANK	88.00	1.85	1.15	1.73	1.73	1.73	3.44	20.88	2.02	352.00
NCB	43.00	1.78	0.94	11.25	11.25	11.25	1.52	13.41	3.02	258.00
Abu Dhabi										
ETISALAT.AD	19.80	-0.60	-0.60	0.81	0.81	0.81	4.21	16.64	4.04	172.18
FAB.AD	15.34	0.00	0.00	9.89	9.89	9.89	1.41	11.92	3.39	169.46
EMIRATES NBD	17.50	0.29	0.29	1.16	1.16	1.16	1.05	5.29	3.43	110.53
DB ISLAMIC DB	5.78	-0.86	-0.86	1.05	1.05	1.05	0.97	7.33	5.19	41.85
EMAR.DU	7.70	-1.03	-1.03	-2.78	-2.78	-2.78	0.91	7.11	3.25	68.05
Qatar										
QNB	16.160	-1.10	-1.28	-2.24	-2.24	-2.24	1.37	10.39	3.71	149.26
INDUSTREIS QAT	12.600	0.16	0.72	-3.67	-3.67	-3.67	1.97	16.33	8.73	76.23
QA ISLAMIC BK	20.410	0.79	0.99	-5.07	-5.07	-5.07	1.69	11.99	3.06	48.23
MASRAF AL RAYA	2.627	2.26	2.94	-1.05	-1.05	-1.05	1.00	20.78	3.81	24.43
MESAIEED PETRO	1.786	-1.87	-1.87	-0.11	-0.11	-0.11	1.33	19.60	6.16	22.44
Oman										
BANK MUSCAT	0.267	-0.74	-1.11	1.14	1.14	1.14	0.87	10.12	5.62	2.00
OMANTEL	1.070	0.00	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	0.287	0.35	0.35	2.50	2.50	2.50	0.70	10.36	2.58	0.47
OMINVEST	0.466	-0.85	-0.85	10.95	10.95	10.95	1.02	12.76	3.22	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.72 %The leading sector best performance indices today are Technology 9.37 % Insurance 1.75 % Consumer Staples 0.87 % respectively

KSA

Saudi Armco has a negative performance today by -1.37 %, SABIC has a negative performance today by - 0.12 % STC has a positive performance today by – 0.61 %, Al Rajhi Bank has a positive performance today by + 1.85 %.

U.A.E

ETISALAT .AD has a negative performance today by -0.60 %, FAB.AD has a flat performance today



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