



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, January 21, 2024



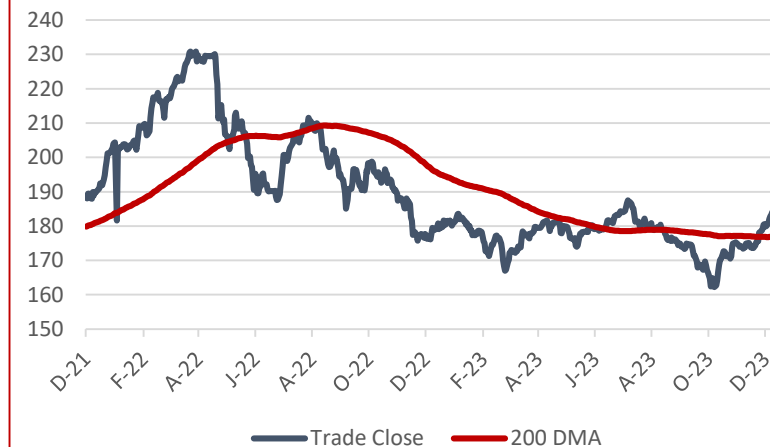


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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,003.66	0.37	0.37	0.30	0.30	0.30	6.49	65.62	3.78	11,059.88
Qatar (QE Index)	10,290.63	-0.27	-0.27	-4.99	-4.99	-4.99	1.22	12.20	4.78	532.67
Dubai (DFMGI)	4,081.71	0.71	-0.55	0.54	0.54	0.54	1.49	9.27	4.30	587.73
Abu Dhabi (ADI)	9,712.40	-0.07	-0.80	1.40	1.40	1.40	3.13	18.28	1.61	2,729.02
Bahrain (BAX)	1,992.48	0.04	0.04	1.06	1.06	1.06	0.79	10.02	5.81	7.29
Muscat SE INDEX	4,604.54	0.38	0.38	2.00	2.00	2.00	0.81	10.54	4.66	6.42
SP GCC Comp LMC	186.38	0.26	0.26	0.77	0.77	0.77	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.03	0.00	0.00	1.59	1.59	1.59				
Developed Markets										
MSCI World Index	3,175.36	1.02	0.22	0.20	0.20	0.20				
U.S. (S&P 500)	4,839.81	1.23	1.17	1.47	1.47	1.47	4.31	24.62	1.92	42,879.79
U.K. (FTSE 100)	7,461.93	0.04	-2.14	-3.51	-3.51	-3.51	1.57	9.92	3.96	1,980.35
Japan (topix)	2,510.03	0.72	0.63	6.07	6.07	6.07	1.49	14.87	2.16	901,459.65
Emerging Markets										
MSCI EM Index	970.91	1.00	-2.55	-5.16	-5.16	-5.16				
China (SSE Composite)	2,832.28	-0.47	-1.72	-4.80	-4.80	-4.80	1.36	12.00		44,025.04
India (Sensex)	71,423.65	-0.36	-1.58	-1.13	-1.13	-1.13	4.59	23.12	1.13	141,670.73

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,264.97	0.48	0.48	6.57	6.57	6.57	1.52	15.19	3.15	46.82
Kuwait Premier Index	7,950.28	0.36	0.36	6.33	6.33	6.33	1.69	16.92	2.99	37.48
Kuwait Main Index	5,985.48	0.95	0.95	7.46	7.46	7.46	1.09	10.44	3.79	9.34
Kuwait Sector										
Banking	1,759.68	0.55	0.55	6.81	6.81	6.81	1.77	17.27	2.64	29.61
Telecom	1,166.34	0.85	0.85	5.54	5.54	5.54	1.75	10.44	6.11	3.55
Industrials	973.99	0.66	0.66	7.28	7.28	7.28	1.08	14.83	2.94	3.35
Financial Services	1,332.83	0.02	0.02	9.95	9.95	9.95	1.06	13.16	3.72	4.24
Real Estate	1,240.51	0.77	0.77	2.28	2.28	2.28	0.96	14.51	2.04	2.64
Basic Materials	775.26	0.38	0.38	3.93	3.93	3.93	1.35	11.18	10.12	0.44
Health Care	477.91	0.00	0.00	-0.88	-0.88	-0.88	1.73	11.99	1.74	0.24
Consumer Staples	683.40	0.73	0.73	3.77	3.77	3.77	1.56	14.57	1.82	0.21
Insurance	2,394.57	-0.19	-0.19	4.44	4.44	4.44	1.35	8.13	3.89	0.97
Consumer Discretionary	1,696.25	-0.14	-0.14	5.76	5.76	5.76				
Energy	983.42	-0.29	-0.29	3.63	3.63	3.63	0.78	10.52	5.15	0.21
Technology	1,818.75	-8.42	-8.42	214.47	214.47	214.47	2.45			0.03
Utilities	457.89	-1.70	-1.70	0.58	0.58	0.58				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil was flat on Friday, but headed for a weekly gain, as traders assess Middle East tensions and oil output disruptions caused by cold weather in the U.S., the world's biggest producer, along with concerns about the health of the Chinese and global economy, Brent crude futures fell 10 cents to \$79 a barrel.

Kuwait Market

The market closed up by + 0.48 % at 7,264.97 value traded 55.3 million KD, Premier market value reached 29.5 million KD up by + 0.36 % at 7,950.28

KSA Market

The market closed up today by + 0.37 % at 12,003.66

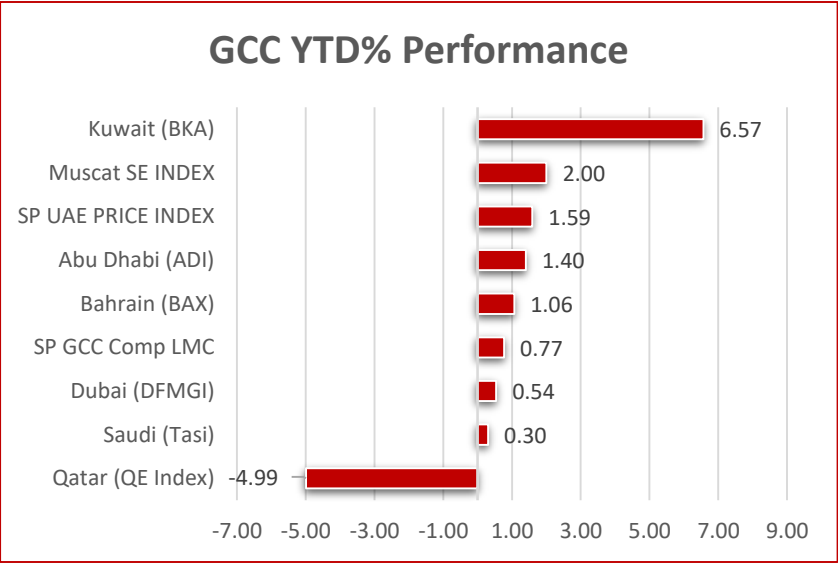


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.971	0.41	0.41	8.61	8.61	8.61	1.84	14.15	3.48	7.70
KFH	0.775	0.39	0.39	6.75	6.75	6.75	1.99	19.14	2.17	11.44
ZAIN	0.522	0.19	0.19	2.96	2.96	2.96	1.81	10.44	6.70	2.26
BOUBYAN BANK	0.630	0.32	0.32	5.00	5.00	5.00	2.53	38.89	0.90	2.50
AGILITY	0.545	0.93	0.93	7.07	7.07	7.07	0.78	16.53	0.00	1.46
Saudi Arabia										
ARAMCO	32.00	0.31	0.31	-3.03	-3.03	-3.03	5.01	16.29	4.74	7,744.00
SABIC	77.80	1.04	1.04	-6.83	-6.83	-6.83	1.34	75.89	4.37	233.40
STC	41.50	0.61	0.61	2.72	2.72	2.72	2.62	15.06	3.86	207.50
AL-RAJHI BANK	85.30	0.24	0.24	-1.39	-1.39	-1.39	3.34	20.24	2.08	341.20
NCB	42.15	-0.47	-0.47	9.06	9.06	9.06	1.49	13.15	3.08	252.90
Abu Dhabi										
ETISALAT.AD	19.96	0.60	0.20	1.63	1.63	1.63	4.24	16.78	4.01	173.59
FAB.AD	15.20	2.01	-0.91	8.88	8.88	8.88	1.40	11.81	3.42	167.92
EMIRATES NBD	17.45	1.45	0.00	0.87	0.87	0.87	1.05	5.27	3.44	110.22
DB ISLAMIC DB	5.80	0.69	-0.51	1.40	1.40	1.40	0.97	7.35	5.17	42.00
EMAR.DU	7.60	1.06	-2.31	-4.04	-4.04	-4.04	0.90	7.01	3.29	67.17
Qatar										
QNB	16.090	-0.06	-0.06	-2.66	-2.66	-2.66	1.36	10.35	4.04	148.74
INDUSTREIS QAT	11.910	-0.75	-0.75	-8.94	-8.94	-8.94	1.86	15.44	9.24	72.11
QA ISLAMIC BK	19.590	-0.76	-0.76	-8.88	-8.88	-8.88	1.57	11.33	3.19	46.33
MASRAF AL RAYA	2.546	0.04	0.04	-4.11	-4.11	-4.11	0.97	20.13	3.93	23.70
MESAIEED PETRO	1.684	-0.94	-0.94	-5.82	-5.82	-5.82	1.25	18.48	6.53	21.17
Oman										
BANK MUSCAT	0.268	-0.37	-0.37	1.52	1.52	1.52	0.87	10.16	5.60	2.01
OMANTEL	1.090	0.00	0.00	2.83	2.83	2.83	1.28	30.15	2.98	0.82
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	0.275	1.85	1.85	-1.79	-1.79	-1.79	0.67	9.93	2.69	0.45
OMINVEST	0.460	-1.50	-1.50	9.52	9.52	9.52	1.01	12.59	3.26	0.31

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-January-24	24.26%	14.71%	0.06%	2.12%	0.19%	5.61%	17.77%	12.97%	6.16%	5.52%
17-January-24	24.33%	14.79%	0.06%	2.20%	0.20%	5.64%	17.72%	13.05%	6.16%	5.24%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.48 % The leading sector best performance indices today are Telecom 0.85 % Real estate 0.77 % Consumer services 0.73 % respectively

KSA
Saudi Armco has a positive performance today by + 0.31 %, SABIC has a positive performance today by + 1.04 % STC has a negative performance today by + 0.61 %, Al Rajhi Bank has a positive performance today by + 0.24 %.

U.A.E
ETISALAT .AD has a positive performance today by + 0.60 %, FAB.AD has a positive performance today by + 2.01 %



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