

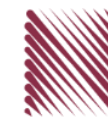


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 22, 2024

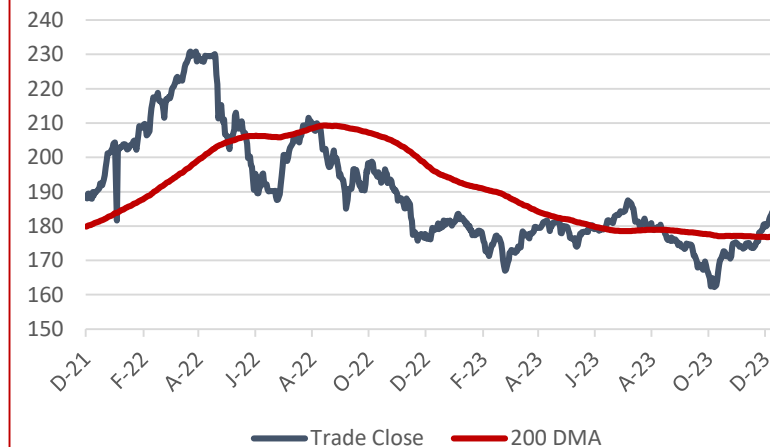




Monday, January 22, 2024

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,110.32	0.89	1.26	1.19	1.19	1.19	6.85	69.30	3.77	11,013.54
Qatar (QE Index)	10,369.56	0.77	0.49	-4.26	-4.26	-4.26	1.23	12.30	4.75	535.62
Dubai (DFMGI)	4,081.24	-0.01	-0.01	0.53	0.53	0.53	1.49	9.26	4.30	586.91
Abu Dhabi (ADI)	9,680.45	-0.33	-0.33	1.07	1.07	1.07	3.12	18.22	1.62	2,724.75
Bahrain (BAX)	1,994.33	0.09	0.13	1.16	1.16	1.16	0.79	10.03	5.81	7.30
Muscat SE INDEX	4,607.48	0.06	0.45	2.07	2.07	2.07	0.81	10.54	4.66	6.43
SP GCC Comp LMC	187.94	0.84	1.10	1.62	1.62	1.62	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.99	-0.03	-0.03	1.57	1.57	1.57				
Developed Markets										
MSCI World Index	3,189.10	0.43	0.43	0.63	0.63	0.63				
U.S. (S&P 500)	4,850.43	0.22	0.22	1.69	1.69	1.69	4.31	24.62	1.92	42,884.01
U.K. (FTSE 100)	7,487.71	0.35	0.35	-3.17	-3.17	-3.17	1.58	9.95	3.95	1,987.12
Japan (topix)	2,544.92	1.39	1.39	7.54	7.54	7.54	1.51	15.08	2.13	914,011.26
Emerging Markets										
MSCI EM Index	964.15	-0.70	-0.70	-5.82	-5.82	-5.82				
China (SSE Composite)	2,756.34	-2.68	-2.68	-7.35	-7.35	-7.35	1.36	12.00		44,025.04
India (Sensex)	71,423.65	-0.36	-1.58	-1.13	-1.13	-1.13	4.57	22.83	1.14	140,779.27
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,275.21	0.14	0.62	6.72	6.72	6.72	1.53	15.25	3.13	47.04
Kuwait Premier Index	7,983.34	0.42	0.77	6.77	6.77	6.77	1.69	16.97	2.98	37.61
Kuwait Main Index	5,932.52	-0.88	0.06	6.51	6.51	6.51	1.10	10.54	3.76	9.43
Kuwait Sector										
Banking	1,764.01	0.25	0.79	7.07	7.07	7.07	1.78	17.35	2.63	29.75
Telecom	1,179.82	1.16	2.01	6.76	6.76	6.76	1.76	10.53	6.06	3.58
Industrials	972.14	-0.19	0.47	7.08	7.08	7.08	1.09	14.93	2.92	3.37
Financial Services	1,325.73	-0.53	-0.51	9.36	9.36	9.36	1.06	13.13	3.71	4.24
Real Estate	1,243.16	0.21	0.98	2.49	2.49	2.49	0.96	14.62	2.03	2.67
Basic Materials	777.50	0.29	0.67	4.23	4.23	4.23	1.35	11.23	10.08	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	687.44	0.59	1.33	4.38	4.38	4.38	1.57	14.35	1.80	0.21
Insurance	2,387.76	-0.28	-0.47	4.14	4.14	4.14	1.35	8.14	3.90	0.97
Consumer Discretionary	1,671.02	-1.49	-1.63	4.18	4.18	4.18				
Energy	985.34	0.20	-0.10	3.83	3.83	3.83	0.78	10.48	5.16	0.21
Technology	1,673.25	-8.00	-15.75	189.31	189.31	189.31	2.24			0.03
Utilities	450.00	-1.72	-3.39	-1.16	-1.16	-1.16				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

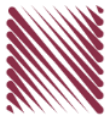
Oil prices fell for a second day on Monday as economic headwinds pressured the global oil demand outlook and outweighed geopolitical concerns in the Middle East and an attack on a Russian fuel export terminal over the weekend. Brent crude fell 41 cents, or 0.5%, to \$78.15 a barrel.

Kuwait Market

The market closed up by + 0.14 % at 7,275.21 value traded 61.4 million KD, Premier market value reached 44.0 million KD up by + 0.42 % at 7,983.34

KSA Market

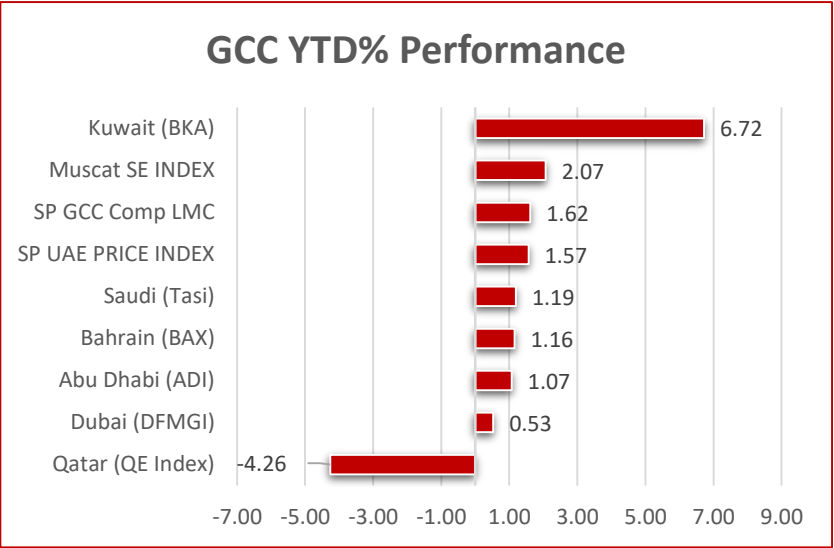
The market closed up today by + 0.89 % at 12,110.32



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.977	0.62	1.03	9.28	9.28	9.28	1.85	14.24	3.46	7.73
KFH	0.779	0.52	0.91	7.30	7.30	7.30	2.00	19.24	2.16	11.46
ZAIN	0.528	1.15	1.34	4.14	4.14	4.14	1.83	10.56	6.63	2.26
BOUBYAN BANK	0.635	0.79	1.11	5.83	5.83	5.83	2.55	39.20	0.89	2.50
AGILITY	0.551	1.10	2.04	8.25	8.25	8.25	0.79	16.71	0.00	1.47
Saudi Arabia										
ARAMCO	31.65	-1.09	-0.78	-4.09	-4.09	-4.09	4.96	16.11	4.79	7,659.30
SABIC	78.20	0.51	1.56	-6.35	-6.35	-6.35	1.35	76.28	4.35	234.60
STC	41.85	0.84	1.45	3.59	3.59	3.59	2.65	15.19	3.82	209.25
AL-RAJHI BANK	86.80	1.76	2.00	0.35	0.35	0.35	3.39	20.60	2.04	347.20
NCB	43.15	2.37	1.89	11.64	11.64	11.64	1.52	13.46	3.01	258.90
Abu Dhabi										
ETISALAT.AD	20.12	0.80	0.80	2.44	2.44	2.44	4.27	16.91	3.98	174.97
FAB.AD	15.14	-0.39	-0.39	8.45	8.45	8.45	1.39	11.77	3.43	167.26
EMIRATES NBD	17.50	0.29	0.29	1.16	1.16	1.16	1.05	5.29	3.43	110.54
DB ISLAMIC DB	5.80	0.00	0.00	1.40	1.40	1.40	0.97	7.35	5.17	42.00
EMAR.DU	7.46	-1.84	-1.84	-5.81	-5.81	-5.81	0.89	6.88	3.35	65.94
Qatar										
QNB	16.150	0.37	0.31	-2.30	-2.30	-2.30	1.37	10.39	4.02	149.04
INDUSTREIS QAT	12.030	1.01	0.25	-8.03	-8.03	-8.03	1.88	15.59	9.14	72.72
QA ISLAMIC BK	20.190	3.06	2.28	-6.09	-6.09	-6.09	1.62	11.67	3.10	47.67
MASRAF AL RAYA	2.580	1.34	1.38	-2.82	-2.82	-2.82	0.98	20.40	3.88	23.97
MESAIEED PETRO	1.661	-1.37	-2.29	-7.10	-7.10	-7.10	1.24	18.22	6.62	20.85
Oman										
BANK MUSCAT	0.27	0.75	0.37	2.27	2.27	2.27	0.88	10.23	5.56	2.03
OMANTEL	1.088	-0.18	-0.18	2.64	2.64	2.64	1.28	30.10	2.99	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	0.274	-0.36	1.48	-2.14	-2.14	-2.14	0.67	9.89	2.70	0.45
OMINVEST	0.458	-0.43	-1.93	9.05	9.05	9.05	1.01	12.54	3.28	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 + 0.14 % The leading sector best performance indices today are Telecom 1.16 % Consumer Staples 0.59 % Basic Material 0.29 % respectively

KSA

Saudi Armco has a negative performance today by - 1.09 %, SABIC has a positive performance today by + 0.51 % STC has a positive performance today by + 0.84 %, Al Rajhi Bank has a positive performance today by + 1.76 %.

U.A.E

ETISALAT .AD has a positive performance today by + 0.80 %, FAB.AD has a negative performance today by - 0.39 %



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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