



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 23, 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)	12,105.33	-0.04	1.22	1.15	1.15	1.15	6.55	66.19	3.75	11,012.60
Qatar (QE Index)	10,362.29	-0.07	0.42	-4.32	-4.32	-4.32	1.23	12.29	4.75	534.45
Dubai (DFMGI)	4,107.52	0.64	0.63	1.18	1.18	1.18	1.50	9.30	4.28	591.35
Abu Dhabi (ADI)	9,653.34	-0.28	-0.61	0.79	0.79	0.79	3.11	18.22	1.61	2,719.22
Bahrain (BAX)	1,995.97	0.08	0.21	1.24	1.24	1.24	0.80	10.04	5.80	7.30
Muscat SE INDEX	4,625.08	0.38	0.83	2.46	2.46	2.46	0.82	10.58	4.64	6.45
SP GCC Comp LMC	188.01	0.04	1.14	1.65	1.65	1.65	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.97	-0.02	-0.04	1.55	1.55	1.55				
Developed Markets										
MSCI World Index	3,190.90	0.06	0.49	0.69	0.69	0.69				
U.S. (S&P 500)	4,864.60	0.29	0.51	1.99	1.99	1.99	4.32	24.68	1.91	42,975.76
U.K. (FTSE 100)	7,485.73	-0.03	0.32	-3.20	-3.20	-3.20	1.58	9.95	3.95	1,986.96
Japan (topix)	2,542.07	-0.11	1.28	7.42	7.42	7.42	1.51	15.06	2.13	913,200.65
Emerging Markets										
MSCI EM Index	969.97	0.60	-0.10	-5.25	-5.25	-5.25				
China (SSE Composite)	2,770.98	0.53	-2.16	-6.86	-6.86	-6.86	1.36	12.00		44,025.04
India (Sensex)	70,370.55	-1.47	-1.47	-2.59	-2.59	-2.59	4.51	22.50	1.16	138,845.06

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,313.27	0.52	1.15	7.28	7.28	7.28	1.53	15.28	3.13	47.09
Kuwait Premier Index	8,029.28	0.58	1.35	7.39	7.39	7.39	1.70	17.04	2.97	37.75
Kuwait Main Index	5,951.81	0.33	0.39	6.86	6.86	6.86	1.09	10.45	3.79	9.34
Kuwait Sector										
Banking	1,773.43	0.53	1.33	7.65	7.65	7.65	1.78	17.39	2.62	29.81
Telecom	1,176.70	-0.26	1.74	6.48	6.48	6.48	1.78	10.65	5.99	3.62
Industrials	987.27	1.56	2.03	8.74	8.74	8.74	1.09	14.92	2.93	3.36
Financial Services	1,334.27	0.64	0.13	10.07	10.07	10.07	1.06	13.05	3.73	4.22
Real Estate	1,251.56	0.68	1.66	3.19	3.19	3.19	0.97	14.66	2.02	2.67
Basic Materials	774.00	-0.45	0.22	3.76	3.76	3.76	1.35	11.26	10.05	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	694.32	1.00	2.34	5.43	5.43	5.43	1.58	14.60	1.79	0.21
Insurance	2,390.50	0.11	-0.36	4.26	4.26	4.26	1.34	8.15	3.91	0.96
Consumer Discretionary	1,663.91	-0.43	-2.05	3.74	3.74	3.74				
Energy	981.61	-0.38	-0.47	3.44	3.44	3.44	0.78	10.49	5.15	0.21
Technology	1,971.52	17.83	-0.73	240.88	240.88	240.88	2.06			0.02
Utilities	452.63	0.58	-2.83	-0.58	-0.58	-0.58				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Tuesday as traders weighed simmering geopolitical tensions in several regions with supply outages in the U.S. and returning production in Libya. Brent crude futures lost 62 cents, or 0.8%, to \$79.44 a barrel.

Kuwait Market

The market closed up by + 0.52 % at 7,313.27 value traded 66.0 million KD, Premier market value reached 50.4 million KD up by + 0.58 % at 8,029.28

KSA Market

The market closed down today by - 0.04 % at 12,105.33

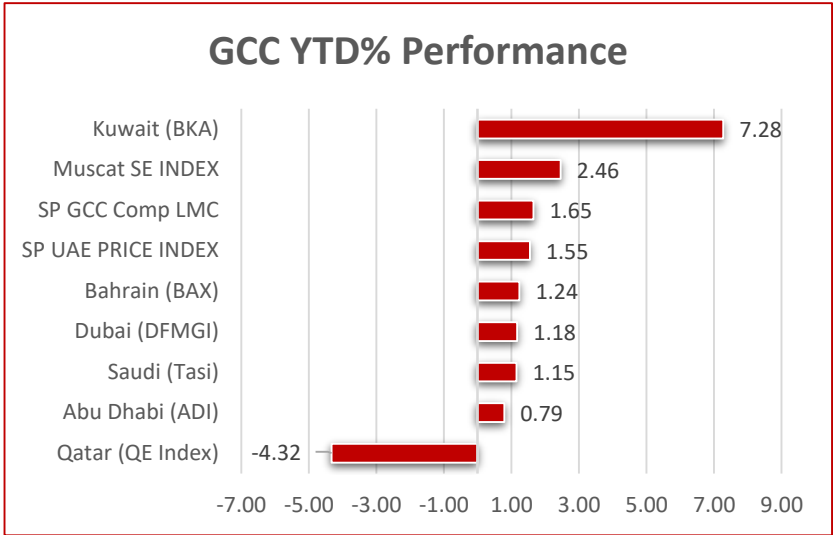


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.979	0.20	1.24	9.51	9.51	9.51	1.85	14.27	3.45	7.77
KFH	0.783	0.51	1.42	7.85	7.85	7.85	2.01	19.34	2.15	11.56
ZAIN	0.528	0.00	1.34	4.14	4.14	4.14	1.83	10.56	6.63	2.29
BOUBYAN BANK	0.640	0.79	1.91	6.67	6.67	6.67	2.57	39.51	0.88	2.54
AGILITY	0.570	3.45	5.56	11.98	11.98	11.98	0.82	17.28	0.00	1.53
Saudi Arabia										
ARAMCO	31.65	0.00	-0.78	-4.09	-4.09	-4.09	4.96	16.11	4.79	7,658.89
SABIC	78.80	0.77	2.34	-5.63	-5.63	-5.63	1.36	76.87	4.31	236.39
STC	41.95	0.24	1.70	3.84	3.84	3.84	2.65	15.22	3.81	209.74
AL-RAJHI BANK	87.00	0.23	2.23	0.58	0.58	0.58	3.40	20.65	2.04	347.98
NCB	42.95	-0.46	1.42	11.13	11.13	11.13	1.52	13.40	3.02	257.69
Abu Dhabi										
ETISALAT.AD	20.30	0.89	1.70	3.36	3.36	3.36	4.31	17.06	3.94	176.54
FAB.AD	15.20	0.40	0.00	8.88	8.88	8.88	1.40	11.81	3.42	167.92
EMIRATES NBD	17.70	1.14	1.43	2.31	2.31	2.31	1.06	5.35	3.39	111.80
DB ISLAMIC DB	5.84	0.69	0.69	2.10	2.10	2.10	0.98	7.40	5.14	42.28
EMAR.DU	7.40	-0.80	-2.63	-6.57	-6.57	-6.57	0.88	6.83	3.38	65.41
Qatar										
QNB	15.970	-1.11	-0.81	-3.39	-3.39	-3.39	1.35	10.27	4.07	147.64
INDUSTREIS QAT	11.940	-0.75	-0.50	-8.72	-8.72	-8.72	1.87	15.48	9.21	72.30
QA ISLAMIC BK	20.030	-0.79	1.47	-6.84	-6.84	-6.84	1.61	11.58	3.12	47.37
MASRAF AL RAYA	2.590	0.39	1.77	-2.45	-2.45	-2.45	0.99	20.48	3.86	24.11
MESAIEED PETRO	1.727	3.97	1.59	-3.41	-3.41	-3.41	1.29	18.95	6.37	21.72
Oman										
BANK MUSCAT	0.27	0.00	0.37	2.27	2.27	2.27	0.88	10.23	5.56	2.03
OMANTEL	1.100	1.10	0.92	3.77	3.77	3.77	1.29	30.43	2.95	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	0.270	-1.46	0.00	-3.57	-3.57	-3.57	0.66	9.75	2.74	0.44
OMINVEST	0.467	1.97	0.00	11.19	11.19	11.19	1.03	12.78	3.21	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 + 0.52 % The leading sector best performance indices today are Technology 17.83 % Industrials 1.56 % Real Estate 0.68 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by + 0.77 % STC has a positive performance today by + 0.24 %, Al Rajhi Bank has a positive performance today by + 0.23 %.

U.A.E

ETISALAT .AD has a positive performance today by + 0.89 %, FAB.AD has a positive performance today by + 0.40 %



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