

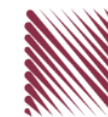


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, January 28, 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)	12,264.17	0.84	0.84	2.48	2.48	2.48	6.13	61.83	3.72	10,989.79
Qatar (QE Index)	10,347.21	0.00	0.00	-4.46	-4.46	-4.46	1.23	12.02	4.76	535.06
Dubai (DFMGI)	4,163.33	-0.24	2.00	2.55	2.55	2.55	1.45	9.20	5.00	597.99
Abu Dhabi (ADI)	9,567.68	-0.61	-1.49	-0.11	-0.11	-0.11	3.06	17.97	1.70	2,694.38
Bahrain (BAX)	2,017.23	0.17	0.17	2.32	2.32	2.32	0.81	10.20	5.71	7.39
Muscat SE INDEX	4,595.93	-0.25	-0.25	1.81	1.81	1.81	0.81	10.52	4.84	6.41
SP GCC Comp LMC	189.82	0.73	0.73	2.64	2.64	2.64	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.99	0.00	0.00	0.84	0.84	0.84				
Developed Markets										
MSCI World Index	3,216.23	0.12	1.29	1.48	1.48	1.48				
U.S. (S&P 500)	4,890.97	-0.07	1.06	2.54	2.54	2.54	4.34	24.92	1.90	43,319.55
U.K. (FTSE 100)	7,635.09	1.40	2.32	-1.27	-1.27	-1.27	1.61	10.14	3.87	2,026.37
Japan (topix)	2,497.65	-1.35	-0.49	5.55	5.55	5.55	1.49	14.83	2.17	897,401.28
Emerging Markets										
MSCI EM Index	985.10	-0.32	1.46	-3.77	-3.77	-3.77				
China (SSE Composite)	2,910.22	0.14	2.75	-2.18	-2.18	-2.18	1.36	12.00		44,025.04
India (Sensex)	70,700.67	-0.51	-1.01	-2.13	-2.13	-2.13	4.53	22.57	1.15	139,642.89

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,331.6	-0.16	-0.16	7.54	7.54	7.54	1.55	15.41	3.10	47.50
Kuwait Premier Index	8,049.9	-0.16	-0.16	7.66	7.66	7.66	1.72	17.19	2.94	38.09
Kuwait Main Index	5,965.2	-0.14	-0.14	7.10	7.10	7.10	1.09	10.52	3.77	9.41
Kuwait Sector										
Banking		0.03	0.03	8.29	8.29	8.29	1.80	17.56	2.60	30.10
Telecom	1,784.1	-0.49	-0.49	5.89	5.89	5.89	1.78	10.61	6.01	3.61
Industrials	1,170.2	-0.08	-0.08	8.48	8.48	8.48	1.10	15.17	2.89	3.41
Financial Services	984.9	-0.08	-0.08	11.47	11.47	11.47	1.08	13.33	3.66	4.30
Real Estate	1,351.2	-0.78	-0.78	1.28	1.28	1.28	0.96	14.60	2.03	2.66
Basic Materials	1,228.5	-1.37	-1.37	1.89	1.89	1.89	1.34	11.16	10.15	0.43
Health Care	760.0	0.00	0.00	0.06	0.06	0.06	1.75	12.11	1.72	0.24
Consumer Staples	482.5	1.24	1.24	6.63	6.63	6.63	1.59	14.74	1.78	0.21
Insurance	702.2	-0.48	-0.48	3.92	3.92	3.92	1.35	8.17	3.90	0.97
Consumer Discretionary	2,382.8	-1.76	-1.76	1.02	1.02	1.02				
Energy	1,620.3	-1.51	-1.51	8.73	8.73	8.73	0.83	11.20	4.84	0.22
Technology	1,031.9	0.75	0.75	239.62	239.62	239.62	2.41			0.03
Utilities	1,964.3	-0.58	-0.58	-0.58	-0.58	-0.58				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices advanced early Monday after missiles launched by Iran-backed militants killed U.S. troops in Jordan on the weekend. Global benchmark Brent traded 0.57% higher at \$84.03 a barrel, while the U.S. West Texas Intermediate futures rose 0.6% to \$78.48 per barrel.

Kuwait Market

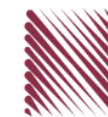
The market closed down by - 0.16 % at 7,331.57 value traded 50.2 million KD, Premier market value reached 31.1 million KD down by - 0.16 % at 8,049.9

KSA Market

The market closed up today down + 0.84 % at 12,264.17

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.991	0.41	0.41	10.85	10.85	10.85	1.88	14.45	3.41	7.86
KFH	0.785	-0.13	-0.13	8.13	8.13	8.13	2.01	19.39	2.14	11.59
ZAIN	0.525	-0.94	-0.94	3.55	3.55	3.55	1.82	10.50	6.67	2.27
BOUBYAN BANK	0.638	-0.16	-0.16	6.33	6.33	6.33	2.56	39.38	0.89	2.53
AGILITY	0.567	-0.53	-0.53	11.39	11.39	11.39	0.81	17.19	0.00	1.52
Saudi Arabia										
ARAMCO	31.40	-0.48	-0.48	-4.85	-4.85	-4.85	4.92	15.98	4.83	7,598.80
SABIC	79.20	0.51	0.51	-5.15	-5.15	-5.15	1.37	77.26	4.29	237.60
STC	42.20	-1.06	-1.06	4.46	4.46	4.46	2.67	15.31	3.79	211.00
AL-RAJHI BANK	91.50	3.39	3.39	5.78	5.78	5.78	3.58	21.71	1.94	366.00
NCB	43.15	0.23	0.23	11.64	11.64	11.64	1.52	13.46	3.01	258.90
Abu Dhabi										
ETISALAT.AD	19.60	-2.39	-1.80	-0.20	-0.20	-0.20	4.16	16.47	4.08	170.46
FAB.AD	14.94	-1.71	-1.71	7.02	7.02	7.02	1.37	11.61	3.48	165.05
EMIRATES NBD	18.10	-1.63	3.72	4.62	4.62	4.62	1.04	5.45	6.63	114.33
DB ISLAMIC DB	6.25	0.00	7.76	9.27	9.27	9.27	1.01	7.09	7.20	45.25
EMAR.DU	7.47	0.27	-1.71	-5.68	-5.68	-5.68	0.89	6.89	3.35	66.03
Qatar										
QNB	16.100	0.31	0.31	-2.60	-2.60	-2.60	1.36	10.35	4.04	148.87
INDUSTREIS QAT	12.270	0.57	0.57	-6.19	-6.19	-6.19	1.92	15.91	8.96	74.31
QA ISLAMIC BK	19.940	-0.05	-0.05	-7.26	-7.26	-7.26	1.60	11.53	3.13	47.17
MASRAF AL RAYA	2.457	0.33	0.33	-7.46	-7.46	-7.46	0.93	16.26	4.07	22.87
MESAIEED PETRO	1.710	0.00	0.00	-4.36	-4.36	-4.36	1.27	18.76	6.43	21.51
Oman										
BANK MUSCAT	0.268	0.00	0.00	1.52	1.52	1.52	0.87	10.16	5.60	2.01
OMANTEL	1.080	0.09	0.09	1.89	1.89	1.89	1.27	29.88	3.01	0.81
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.66	16.51	4.84	0.48
NAT BANK OF OMAN	0.271	0.00	0.00	-3.21	-3.21	-3.21	0.66	9.78	2.73	0.44
OMINVEST	0.465	0.00	0.00	10.71	10.71	10.71	1.02	12.73	3.23	0.31

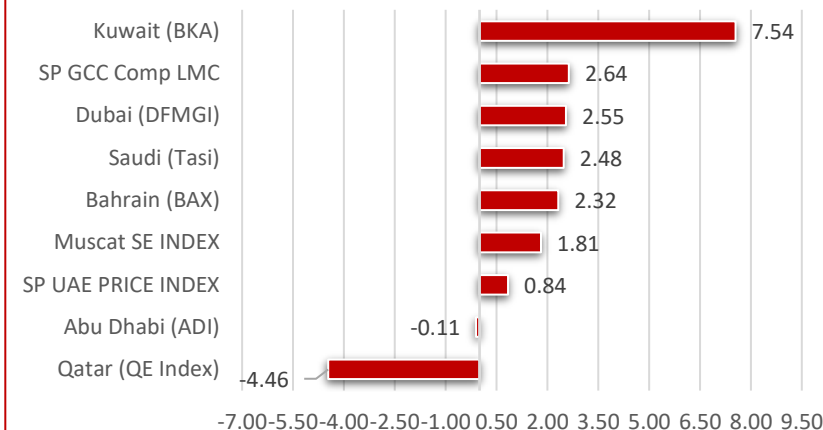
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-January-24	24.33%	14.79%	0.06%	2.20%	0.20%	5.64%	17.72%	13.05%	6.16%	5.24%
24-January-24	24.35%	14.76%	0.06%	2.28%	0.19%	5.60%	17.69%	13.07%	6.20%	5.20%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by -0.16 %The leading sector bottom performance indices today are Consumer Disc -1.76 % Energy -1.51 % Basic materials -1.37 % respectively

KSA

Saudi Armco have negative performance today by -0.48 %, SABIC have positive performance today by + 0.50 %. STC have negative performance today by -1.06 %, Al Rajhi Bank has a positive performance today by + 3.39 %

U.A.E

ETISALAT .AD have negative performance today by -2.39 %, FAB.AD have negative performance today by -1.71 %



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