



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 30, 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)	11,986.0	-2.18	-1.44	0.16	0.16	0.16	2.36	20.09	2.89	10,883.20
Qatar (QE Index)	10,109.9	-0.41	-2.30	-6.65	-6.65	-6.65	1.20	11.72	4.88	523.85
Dubai (DFMGI)	4,168.4	-0.05	0.12	2.68	2.68	2.68	1.45	9.20	5.00	600.34
Abu Dhabi (ADI)	9,518.8	-0.33	-0.51	-0.62	-0.62	-0.62	3.04	17.88	1.72	2,680.51
Bahrain (BAX)	2,070.0	1.43	2.79	4.99	4.99	4.99	0.84	10.62	5.49	7.59
Muscat SE INDEX	4,587.1	-0.10	-0.44	1.62	1.62	1.62	0.81	10.54	4.89	6.40
SP GCC Comp LMC	186.3	-1.53	-1.14	0.74	0.74	0.74	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.9	-0.73	-0.79	0.04	0.04	0.04				
Developed Markets										
MSCI World Index	3,236.8	0.01	0.64	2.13	2.13	2.13				
U.S. (S&P 500)	4,925.0	-0.06	0.70	3.25	3.25	3.25	4.37	25.11	1.89	43,651.77
U.K. (FTSE 100)	7,666.3	0.44	0.41	-0.87	-0.87	-0.87	1.61	10.19	3.86	2,033.07
Japan (topix)	2,526.9	-0.10	1.17	6.78	6.78	6.78	1.50	14.99	2.14	907,611.68
Emerging Markets										
MSCI EM Index	980.6	-0.97	-0.46	-4.22	-4.22	-4.22				
China (SSE Composite)	2,830.5	-1.83	-2.74	-4.85	-4.85	-4.85	1.36	12.00		44,025.04
India (Sensex)	71,139.9	-1.11	0.62	-1.52	-1.52	-1.52	4.56	22.66	1.15	140,539.64

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,328.8	0.29	-0.19	7.50	7.50	7.50	1.54	15.33	3.12	47.29
Kuwait Premier Index	8,032.0	0.21	-0.38	7.42	7.42	7.42	1.71	17.10	2.96	37.88
Kuwait Main Index	6,004.5	0.60	0.51	7.81	7.81	7.81	1.09	10.49	3.77	9.40
Kuwait Sector										
Banking	1,780.8	0.15	-0.16	8.09	8.09	8.09	1.79	17.51	2.60	30.02
Telecom	1,189.6	2.01	1.16	7.64	7.64	7.64	1.76	10.52	6.06	3.58
Industrials	975.8	-0.08	-1.00	7.48	7.48	7.48	1.09	15.02	2.91	3.38
Financial Services	1,362.6	0.37	0.76	12.40	12.40	12.40	1.08	13.33	3.65	4.32
Real Estate	1,227.2	0.78	-0.89	1.18	1.18	1.18	0.95	14.34	2.07	2.62
Basic Materials	763.4	0.54	-0.93	2.34	2.34	2.34	1.32	11.00	10.30	0.43
Health Care	482.5	0.00	0.00	0.06	0.06	0.06	1.75	12.11	1.72	0.24
Consumer Staples	693.6	-1.03	0.00	5.31	5.31	5.31	1.61	14.97	1.76	0.21
Insurance	2,379.6	-0.28	-0.61	3.79	3.79	3.79	1.34	8.18	3.91	0.96
Consumer Discretionary	1,593.4	-0.89	-3.39	-0.66	-0.66	-0.66				
Energy	996.9	-1.71	-4.85	5.04	5.04	5.04	0.80	10.83	5.01	0.21
Technology	2,015.2	0.36	3.36	248.43	248.43	248.43	2.48			0.03
Utilities	447.4	-0.58	-1.73	-1.73	-1.73	-1.73				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged off in early Asian trading on Wednesday on continued bearish fundamentals, following gains in the previous session amid an escalating conflict in the Middle East. The March Brent crude futures, which expires today, fell 37 cents to \$82.50 a barrel by 0146 GMT. The more actively-traded April contract fell 24 cents to \$82.26 a barrel.

Kuwait Market

The market closed up by + 0.29 % at 7,328.8 value traded 80.5 million KD, Premier market value reached 58.3 million KD up by + 0.21 % at 8,032.0

KSA Market

The market closed down by - 2.18 % at 11,986.0

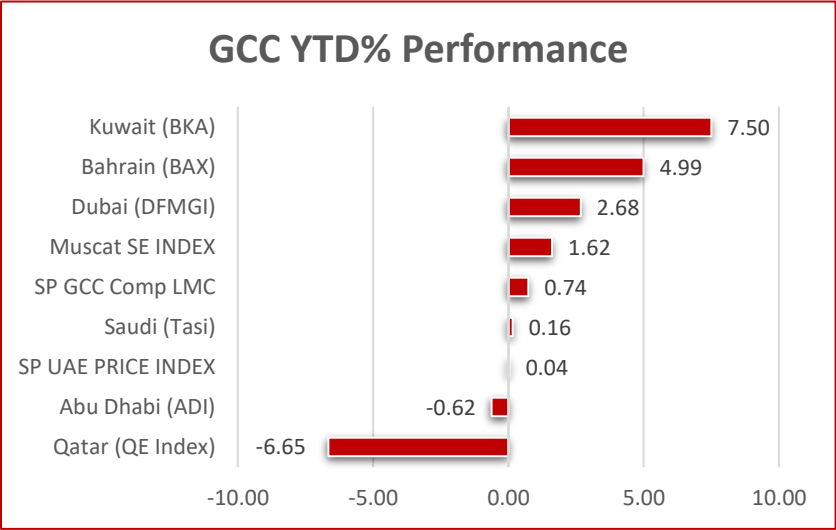


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.998	0.71	1.11	11.63	11.63	11.63	1.89	14.55	3.39	7.91
KFH	0.782	0.13	-0.51	7.71	7.71	7.71	2.00	19.31	2.15	11.55
ZAIN	0.528	1.15	-0.38	4.14	4.14	4.14	1.83	10.56	6.63	2.28
BOUBYAN BANK	0.620	-2.05	-2.97	3.33	3.33	3.33	2.49	38.27	0.91	2.46
AGILITY	0.565	0.36	-0.88	11.00	11.00	11.00	0.81	17.13	0.00	1.51
Saudi Arabia										
ARAMCO	31.30	0.16	-0.79	-5.15	-5.15	-5.15	4.90	15.93	4.84	7,574.60
SABIC	78.10	-2.01	-0.89	-6.47	-6.47	-6.47	1.35	76.18	4.35	234.30
STC	41.75	-0.12	-2.11	3.34	3.34	3.34	2.64	15.15	3.83	208.75
AL-RAJHI BANK	88.10	-2.65	-0.45	1.85	1.85	1.85	3.45	20.91	2.01	352.40
NCB	42.10	-1.86	-2.21	8.93	8.93	8.93	1.49	13.13	3.08	252.60
Abu Dhabi										
ETISALAT.AD	19.24	-2.83	-1.84	-2.04	-2.04	-2.04	4.09	16.17	4.16	167.35
FAB.AD	14.52	-0.55	-2.81	4.01	4.01	4.01	1.33	11.29	3.58	160.44
EMIRATES NBD	18.05	-0.82	-0.28	4.34	4.34	4.34	1.04	5.43	6.65	114.03
DB ISLAMIC DB	6.37	0.79	1.92	11.36	11.36	11.36	1.03	7.22	7.06	46.13
EMAR.DU	7.42	-0.27	-0.67	-6.31	-6.31	-6.31	0.88	6.85	3.37	65.59
Qatar										
QNB	15.700	-0.44	-2.18	-5.02	-5.02	-5.02	1.33	10.10	4.14	145.01
INDUSTREIS QAT	12.000	-2.28	-1.64	-8.26	-8.26	-8.26	1.88	15.56	9.17	72.60
QA ISLAMIC BK	19.180	-0.62	-3.86	-10.79	-10.79	-10.79	1.54	11.09	3.26	45.32
MASRAF AL RAYA	2.386	-1.04	-2.57	-10.13	-10.13	-10.13	0.90	15.79	4.19	22.19
MESAIEED PETRO	1.693	0.18	-0.99	-5.31	-5.31	-5.31	1.26	18.58	6.50	21.27
Oman										
BANK MUSCAT	0.269	-0.37	0.37	1.89	1.89	1.89	0.86	10.66	5.58	2.02
OMANTEL	1.077	0.65	-0.19	1.60	1.60	1.60	1.26	29.79	3.02	0.81
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.270	0.00	-0.37	-3.57	-3.57	-3.57	0.66	9.75	3.15	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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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.29 %The leading sector best performance indices today are Telecom 2.01 % Real estate 0.78 % Basic materials 0.54 % respectively

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC have negative performance today by -2.0 %. STC have negative performance today by -0.12 %, Al Rajhi Bank have negative performance today by -2.65 %

U.A.E

ETISALAT .AD have negative performance today by -2.83 %, FAB.AD have negative performance today by -0.55 %



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