



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 9, 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)	12,197.61	-0.44	0.43	1.92	1.92	1.92	3.32	19.94	2.96	11,390.97
Qatar (QE Index)	10,416.52	-0.64	-0.17	-3.82	-3.82	-3.82	1.25	12.41	4.68	541.39
Dubai (DFMGI)	4,117.72	0.69	0.73	1.43	1.43	1.43	1.50	9.27	4.29	590.32
Abu Dhabi (ADI)	9,767.00	0.57	1.10	1.97	1.97	1.97	2.69	8.99	2.13	2,742.83
Bahrain (BAX)	1,987.49	0.19	0.75	0.81	0.81	0.81	0.79	10.00	5.82	7.27
Muscat SE INDEX	4,607.20	0.10	0.66	2.06	2.06	2.06	0.81	10.51	4.66	6.41
SP GCC Comp LMC	188.43	-0.10	0.90	1.88	1.88	1.88	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.06	1.00	1.78	1.61	1.61	1.61				
Developed Markets										
MSCI World Index	3,146.97	-0.21	0.85	-0.70	-0.70	-0.70				
U.S. (S&P 500)	4,756.50	-0.15	1.26	-0.28	-0.28	-0.28	4.24	24.04	1.93	42,231.16
U.K. (FTSE 100)	7,683.96	-0.13	-0.07	-0.64	-0.64	-0.64	1.62	10.20	3.85	2,040.68
Japan (topix)	2,413.09	0.82	0.82	1.97	1.97	1.97	1.44	14.30	2.24	868,291.05
Emerging Markets										
MSCI EM Index	993.00	-0.38	-0.91	-3.00	-3.00	-3.00				
China (SSE Composite)	2,893.25	0.20	-1.23	-2.75	-2.75	-2.75	1.36	12.00		44,025.04
India (Sensex)	71,386.21	0.04	-0.89	-1.18	-1.18	-1.18	4.57	23.06	1.14	139,835.29

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,144.28	0.87	2.57	4.80	4.80	4.80	1.49	14.92	3.21	45.94
Kuwait Premier Index	7,866.78	1.03	2.84	5.21	5.21	5.21	1.66	16.66	3.04	36.90
Kuwait Main Index	5,749.49	0.29	1.52	3.23	3.23	3.23	1.05	10.15	3.93	9.04
Kuwait Sector										
Banking	1,734.86	0.74	2.71	5.30	5.30	5.30	1.74	17.03	2.68	29.19
Telecom	1,145.35	2.43	3.28	3.64	3.64	3.64	1.69	10.09	6.32	3.43
Industrials	952.04	1.20	2.49	4.86	4.86	4.86	1.05	14.46	3.02	3.25
Financial Services	1,294.06	1.08	3.83	6.75	6.75	6.75	1.02	12.58	3.87	4.08
Real Estate	1,226.46	0.67	0.35	1.12	1.12	1.12	0.95	14.42	2.06	2.62
Basic Materials	787.56	0.43	2.68	5.58	5.58	5.58	1.37	11.36	9.97	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	679.19	-0.31	1.49	3.13	3.13	3.13	1.56	14.65	1.81	0.21
Insurance	2,298.33	-0.06	-0.22	0.24	0.24	0.24	1.29	8.02	4.06	0.93
Consumer Discretionary	1,672.26	-0.14	1.62	4.26	4.26	4.26				
Energy	979.15	-0.16	0.60	3.18	3.18	3.18	0.77	10.51	5.18	0.20
Technology	588.55	-0.25	-2.53	1.76	1.76	1.76	0.73			0.01
Utilities	473.68	-1.10	1.69	4.05	4.05	4.05				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices inched higher on Wednesday, extending the previous day's rally, after industry data showed U.S. crude stocks fell more than expected last week, though a bigger-than-anticipated build in products inventories capped gains. Brent crude futures rose 29 cents, or 0.4%, to \$77.88 a barrel.

Kuwait Market

The market closed up by 0.87 % at 7,144.28 value traded 78.0 million KD, Premier market value reached 55.4 million KD up by 1.03 % at 7,866.78

KSA Market

The market closed down today by – 0.44 % at 12,197.61

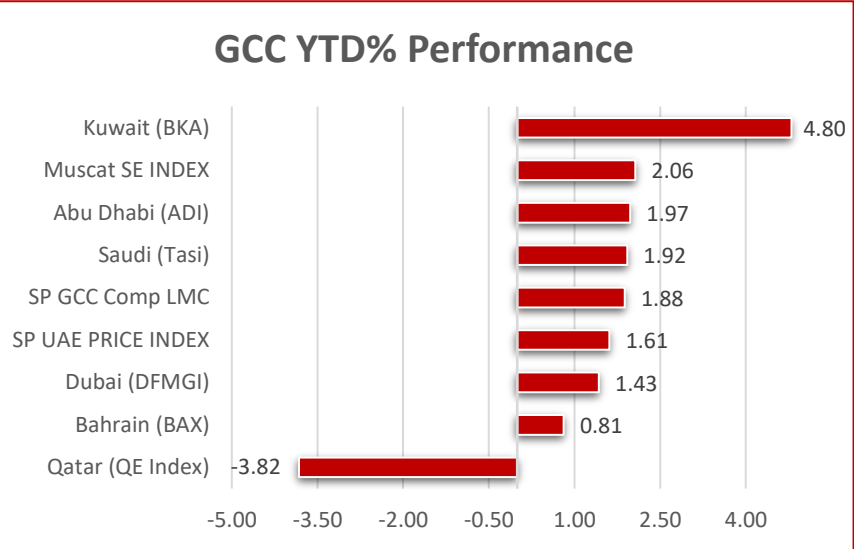


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.946	0.75	2.38	5.82	5.82	5.82	1.79	13.79	3.57	7.51
KFH	0.767	1.05	3.09	5.65	5.65	5.65	1.97	18.94	2.19	11.33
ZAIN	0.522	2.96	3.16	2.96	2.96	2.96	1.81	10.44	6.70	2.26
BOUBYAN BANK	0.626	0.64	2.96	4.33	4.33	4.33	2.51	38.64	0.90	2.48
AGILITY	0.541	2.27	4.64	6.29	6.29	6.29	0.78	16.40	0.00	1.45
Saudi Arabia										
ARAMCO	33.25	-0.60	0.61	0.76	0.76	0.76	5.21	16.92	4.56	8,046.29
SABIC	81.10	-0.73	0.62	-2.87	-2.87	-2.87	1.40	79.11	4.19	243.29
STC	40.90	-0.12	0.12	1.24	1.24	1.24	2.59	14.84	3.91	204.49
AL-RAJHI BANK	87.20	-1.80	-0.34	0.81	0.81	0.81	3.41	20.69	2.04	348.79
NCB	43.00	0.23	0.58	11.25	11.25	11.25	1.52	13.41	3.02	257.99
Abu Dhabi										
ETISALAT.AD	19.78	0.30	1.12	0.71	0.71	0.71	4.20	16.62	4.04	172.02
FAB.AD	15.10	4.28	8.48	8.17	8.17	8.17	1.39	11.74	3.44	166.82
EMIRATES NBD	17.55	0.29	0.00	1.45	1.45	1.45	1.05	5.30	3.42	110.86
DB ISLAMIC DB	5.81	0.52	0.52	1.57	1.57	1.57	0.97	7.37	5.16	42.07
EMAR.DU	7.95	1.02	3.38	0.38	0.38	0.38	0.94	7.34	3.14	70.27
Qatar										
QNB	16.370	-0.91	1.24	-0.97	-0.97	-0.97	1.41	10.73	3.67	151.12
INDUSTREIS QAT	12.410	-0.16	-1.90	-5.12	-5.12	-5.12	1.94	16.09	8.86	75.04
QA ISLAMIC BK	20.150	-1.27	-0.98	-6.28	-6.28	-6.28	1.66	11.84	3.10	47.59
MASRAF AL RAYA	2.505	-0.56	1.05	-5.65	-5.65	-5.65	0.96	19.81	3.99	23.28
MESAIEED PETRO	1.830	-0.49	-2.56	2.35	2.35	2.35	1.36	20.08	6.01	22.98
Oman										
BANK MUSCAT	0.269	-0.74	0.75	1.89	1.89	1.89	0.88	10.19	5.58	2.02
OMANTEL	1.065	0.38	2.40	0.47	0.47	0.47	1.25	29.46	3.05	0.80
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	0.285	0.00	0.35	1.79	1.79	1.79	0.70	10.29	2.60	0.46
OMINVEST	0.470	0.00	0.00	11.90	11.90	11.90	1.03	12.87	3.19	0.31

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
27-December-23	24.49%	14.88%	0.06%	2.02%	0.19%	5.56%	17.66%	12.92%	6.13%	5.51%
3-January-24	24.24%	14.81%	0.06%	2.02%	0.19%	5.55%	17.69%	12.94%	6.14%	5.52%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.87 %The leading sector best performance indices today are Telecom 2.43 % Industrials 1.2 % Financial services 1.08 % respectively

KSA

Saudi Armco have negative performance today by -0.6 %, SABIC have negative performance today by -0.73 %. STC have negative performance today by -0.12 %, Al Rajhi Bank have negative performance today by -1.8 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.3 %, FAB.AD has a positive performance today by + 4.28 %



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