

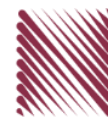


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday , March 11, 2024





Monday, March 11, 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)	12,555.7	-0.50	-0.18	-0.59	4.92	4.92	2.43	22.10	2.96	11,215.90
Qatar (QE Index)	10,190.8	-0.43	-0.39	-2.71	-5.91	-5.91	1.20	12.07	4.64	523.76
Dubai (DFMGI)	4,248.1	-0.12	-0.12	-1.41	4.64	4.64	1.42	8.27	5.33	604.78
Abu Dhabi (ADI)	9,232.2	-0.02	-0.02	-0.24	-3.61	-3.61	2.49	17.05	2.12	2,569.08
Bahrain (BAX)	2,025.5	0.49	0.65	1.00	2.74	2.74	0.80	10.58	4.68	7.40
Muscat SE INDEX	4,766.0	0.13	-0.22	4.64	5.58	5.58	0.80	10.64	5.48	6.62
SP GCC Comp LMC	187.4	-0.32	-0.26	-1.60	1.34	1.34	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.9	-0.13	-0.13	-1.18	-2.85	-2.85				
Developed Markets										
MSCI World Index	3,367.1	-0.39	-0.39	0.90	6.24	6.24				
U.S. (S&P 500)	5,117.9	-0.11	-0.11	0.43	7.30	7.30	4.29	25.40	1.76	45,284.09
U.K. (FTSE 100)	7,669.2	0.12	0.12	0.51	-0.83	-0.83	1.64	12.52	3.90	2,030.63
Japan (topix)	2,666.8	-2.20	-2.20	-0.33	12.70	12.70	1.57	14.89	2.04	955,554.41
Emerging Markets										
MSCI EM Index	1,039.1	0.19	0.19	1.78	1.50	1.50				
China (SSE Composite)	3,068.5	0.74	0.74	1.77	3.14	3.14	1.36	12.00		44,025.04
India (Sensex)	73,502.6	-0.83	-0.83	1.38	1.75	1.75	4.71	23.28	1.12	146,571.46
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (in LC Bn)
Kuwait										
Kuwait All Share Index	7,440.5	0.10	0.40	0.00	9.14	9.14	1.53		3.30	44.60
Kuwait Premier Index	8,160.0	0.23	0.61	0.01	9.13	9.13	1.68	17.33	3.11	37.09
Kuwait Main Index	6,082.0	-0.55	-0.65	-0.07	9.20	9.20	1.06		4.28	7.51
Kuwait Sector										
Banking	1,807.3	0.26	0.70	-0.16	9.70	9.70	1.79	17.58	2.85	27.00
Telecom	1,115.9	-1.03	-0.53	-0.12	0.97	0.97	1.65	10.69	7.46	3.45
Industrials	1,012.5	-0.40	-0.42	-0.27	11.52	11.52	1.13	1.91	2.73	3.47
Financial Services	1,375.1	-0.18	-0.79	-0.88	13.43	13.43	1.11	13.45	3.36	4.39
Real Estate	1,330.0	1.37	2.42	3.94	9.65	9.65	1.00	15.17	1.79	2.82
Basic Materials	774.9	-0.53	-1.03	-0.67	3.88	3.88	1.36	11.28	10.03	0.44
Health Care	478.7	0.00	0.00	-1.54	-0.71	-0.71	1.74	11.98	1.74	0.24
Consumer Staples	720.7	0.38	0.23	0.76	9.43	9.43	1.64	16.99	1.72	0.22
Insurance	2,515.8	-0.83	-0.67	-0.20	9.73	9.73	1.39	9.98	3.68	1.02
Consumer Discretionary	1,665.4	0.51	0.41	-0.08	3.83	3.83				
Energy	1,013.7	-1.84	-2.86	-1.99	6.82	6.82	0.79	10.40	4.88	0.22
Technology	1,957.0	1.13	-0.74	-3.58	238.37	238.37	2.39			0.03
Utilities	444.7	0.59	0.59	-0.59	-2.31	-2.31				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended last week's losses on Monday on concern about slow demand in China, though lingering geopolitical risk surrounding the Middle East and Russia limited the decline. Brent futures fell 48 cents, or 0.6%, to \$81.60 a barrel .

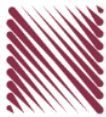
Kuwait Market

The market closed up by + 0.10 % at 7,440.5 value traded 39.8 million KD, Premier market value reached 32.0 million KD up by + 0.23% at 8,160.0

KSA Market

The market closed down by - 0.50 % at 12,555.7

DAILY MARKETS WRAP,
NIC RESEARCH AND STUDIES DEP



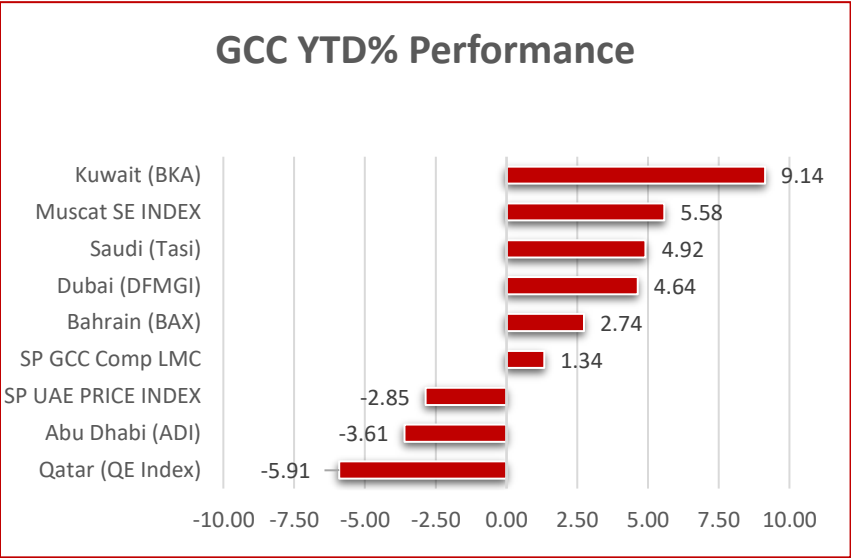
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.972	0.00	0.83	-0.82	8.72	8.72	1.78	14.31	3.60	7.71
KFH	0.812	0.37	0.87	0.25	11.85	11.85	2.03	21.11	2.46	12.75
ZAIN	0.504	-0.98	-0.98	0.20	-0.59	-0.59	1.75	10.12	6.94	2.18
BOUBYAN BANK	0.628	0.80	0.64	-2.33	4.67	4.67	2.48	33.48	1.27	2.49
AGILITY	0.591	-0.84	-1.66	-1.66	16.11	16.11	0.85	17.92	0.00	1.58
Saudi Arabia										
ARAMCO	31.90	-0.93	0.47	0.63	-3.33	-3.33	4.99	16.24	5.31	7,719.80
SABIC	78.70	0.38	0.64	-0.13	-5.75	-5.75	1.41	180.97	4.32	236.10
STC	40.45	-1.94	-1.70	-4.71	0.12	0.12	2.55	15.21	3.96	202.25
AL-RAJHI BANK	85.30	-0.12	-0.58	-4.16	-1.39	-1.39	3.20	21.59	2.70	341.20
NCB	39.90	-0.75	-0.25	-5.79	3.23	3.23	1.35	12.34	3.25	239.40
Abu Dhabi										
ETISALAT.AD	17.90	-0.56	-0.56	-1.10	-8.86	-8.86	3.65	15.11	4.47	155.67
FAB.AD	13.38	-0.30	-0.30	-1.91	-4.15	-4.15	1.18	9.38	5.31	147.79
EMIRATES NBD	16.95	-0.59	-0.59	-7.38	-2.02	-2.02	0.98	5.10	7.08	107.07
DB ISLAMIC DB	5.75	-0.52	-0.52	-10.71	0.52	0.52	0.93	6.52	7.83	41.63
EMAR.DU	8.21	0.49	0.49	1.11	3.66	3.66	0.98	7.58	3.05	72.65
Qatar										
QNB	14.930	0.40	0.81	-1.97	-9.68	-9.68	1.26	9.60	4.35	137.72
INDUSTREIS QAT	11.860	-0.17	0.08	-8.06	-9.33	-9.33	1.80	15.20	6.58	71.75
QA ISLAMIC BK	19.800	-0.40	-0.75	-1.74	-7.91	-7.91	1.59	11.45	3.66	46.79
MASRAF AL RAYA	2.540	0.63	1.03	0.40	-4.33	-4.33	0.96	16.80	3.94	23.62
MESAEED PETRO	1.823	0.28	-1.14	-3.54	1.96	1.96	1.34	21.16	4.72	22.68
Oman										
BANK MUSCAT	0.271	0.37	0.00	3.44	2.65	2.65	0.86	10.74	5.72	2.03
OMANTEL	1.069	-1.02	-2.11	-0.83	0.85	0.85	1.25	29.57	5.61	0.80
BANK DHOFAR	0.150	0.00	0.00	3.45	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.260	0.00	0.00	3.17	-7.14	-7.14	0.63	9.33	3.27	0.42
OMINVEST	0.395	0.00	0.00	1.28	-5.95	-5.95	0.87	10.81	3.80	0.26

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
28-February-24	24.53%	14.91%	0.06%	2.68%	5.51%	17.86%	12.68%	6.29%	5.23%
6-March-24	24.55%	15.02%	0.06%	2.62%	5.53%	17.86%	12.76%	6.32%	5.28%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.10 % The leading sector best performance indices today are Real Estate + 1.37 % Technology + 1.13 % Utilities + 0.59 % respectively.

KSA

Saudi Armco has a negative performance today by - 0.93 %, SABIC has a positive performance today by + 0.38 %. STC has a negative performance today by - 1.94 %, Al Rajhi Bank has a negative performance today by - 0.12 %

U.A.E

ETISALAT .AD has a negative performance today by - 0.56 %, FAB.AD has a negative performance today by - 0.30 %



شركة الاستثمار الوطنية
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