

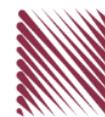


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday, February 12, 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) |
|--------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |        |        |      |       |                |                       |
| Saudi (Tasi)             | 12,295.91   | 0.71  | 0.76  | 4.23  | 2.75   | 2.75   | 2.40 | 20.87 | 2.81           | 10,902.60             |
| Qatar (QE Index)         | 10,093.19   | 0.49  | 1.33  | 0.04  | -6.81  | -6.81  | 1.20 | 11.94 | 4.56           | 515.97                |
| Dubai (DFMGI)            | 4,210.96    | 0.65  | 0.65  | 1.00  | 3.72   | 3.72   | 1.44 | 9.06  | 5.13           | 604.65                |
| Abu Dhabi (ADI)          | 9,324.19    | -0.21 | -0.21 | -1.94 | -2.65  | -2.65  | 2.83 | 18.53 | 2.10           | 2,631.83              |
| Bahrain (BAX)            | 2,077.45    | 0.25  | 0.44  | 0.50  | 5.37   | 5.37   | 0.85 | 10.72 | 5.46           | 7.62                  |
| Muscat SE INDEX          | 4,562.93    | 0.00  | 0.36  | 0.02  | 1.08   | 1.08   | 0.78 | 10.18 | 4.98           | 6.40                  |
| SP GCC Comp LMC          | 187.45      | 0.47  | 0.58  | 2.20  | 1.35   | 1.35   | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 135.15      | 0.39  | 0.39  | -1.74 | -1.95  | -1.95  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |        |        |      |       |                |                       |
| MSCI World Index         | 3,281.01    | -0.01 | -0.01 | 2.36  | 3.53   | 3.53   |      |       |                |                       |
| U.S. (S&P 500)           | 5,021.84    | -0.09 | -0.09 | 3.64  | 5.28   | 5.28   | 4.41 | 25.28 | 1.82           | 44,472.07             |
| U.K. (FTSE 100)          | 7,573.69    | 0.01  | 0.01  | -0.75 | -2.06  | -2.06  | 1.62 | 11.56 | 3.92           | 2,004.36              |
| Japan (topix)            | 2,557.88    | -0.19 | 0.72  | 0.27  | 8.09   | 8.09   | 1.52 | 14.43 | 2.12           | 918,978.65            |
| <b>Emerging Markets</b>  |             |       |       |       |        |        |      |       |                |                       |
| MSCI EM Index            | 996.06      | 0.05  | 0.05  | 2.08  | -2.70  | -2.70  |      |       |                |                       |
| China (SSE Composite)    | 2,865.90    | 1.28  | 4.97  | 2.77  | -3.67  | -3.67  | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 71,072.49   | -0.73 | -0.73 | -0.95 | -1.62  | -1.62  | 4.56 | 22.54 | 1.16           | 142,162.27            |
|                          |             |       |       |       |        |        |      |       |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |        |        |      |       |                |                       |
| Kuwait All Share Index   | 7,360.02    | 0.36  | 1.43  | 1.26  | 7.96   | 7.96   | 1.53 | 15.50 | 3.06           | 47.45                 |
| Kuwait Premier Index     | 8,079.57    | 0.27  | 1.48  | 1.51  | 8.06   | 8.06   | 1.68 | 17.39 | 2.90           | 39.38                 |
| Kuwait Main Index        | 5,990.38    | 0.78  | 1.20  | 0.29  | 7.55   | 7.55   | 1.05 | 9.69  | 3.85           | 8.07                  |
| <b>Kuwait Sector</b>     |             |       |       |       |        |        |      |       |                |                       |
| Banking                  | 1,791.73    | 0.38  | 1.69  | 2.02  | 8.76   | 8.76   | 1.77 | 17.80 | 2.59           | 30.12                 |
| Telecom                  | 1,147.97    | 0.64  | 1.35  | -3.57 | 3.88   | 3.88   | 1.73 | 10.29 | 6.19           | 3.50                  |
| Industrials              | 1,016.47    | -0.46 | 1.08  | 3.18  | 11.96  | 11.96  | 1.15 | 15.72 | 2.79           | 3.53                  |
| Financial Services       | 1,356.12    | 0.65  | 0.02  | -0.16 | 11.87  | 11.87  | 1.08 | 13.25 | 3.44           | 4.29                  |
| Real Estate              | 1,247.21    | -0.32 | 1.00  | 1.94  | 2.83   | 2.83   | 0.95 | 14.78 | 1.96           | 2.69                  |
| Basic Materials          | 760.34      | 1.15  | 1.85  | 0.07  | 1.93   | 1.93   | 1.31 | 10.89 | 10.40          | 0.42                  |
| Health Care              | 479.42      | 0.00  | 0.00  | -0.63 | -0.57  | -0.57  | 1.74 | 12.03 | 1.74           | 0.24                  |
| Consumer Staples         | 688.44      | -0.59 | -2.24 | -2.38 | 4.53   | 4.53   | 1.59 | 14.82 | 1.78           | 0.21                  |
| Insurance                | 2,335.93    | 0.32  | 1.18  | -1.07 | 1.88   | 1.88   | 1.31 | 7.96  | 4.01           | 0.94                  |
| Consumer Discretionary   | 1,606.01    | 1.96  | 4.41  | 1.47  | 0.13   | 0.13   |      |       |                |                       |
| Energy                   | 1,042.10    | 0.47  | 1.16  | 1.87  | 9.81   | 9.81   | 0.79 | 10.39 | 4.86           | 0.22                  |
| Technology               | 2,138.85    | 2.80  | 1.38  | 6.14  | 269.81 | 269.81 | 2.57 |       |                | 0.03                  |
| Utilities                | 436.84      | 0.61  | 1.22  | -2.35 | -4.05  | -4.05  |      |       |                |                       |

### S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices fell in early Asian trade on Monday after Israel said it had “concluded” a series of strikes in southern Gaza, slightly easing concerns about supply from the Middle East. Brent crude futures were down 43 cents, or 0.5%, at \$81.76 a barrel.

#### Kuwait Market

The market closed up by + 0.36 % at 7,360.02 value traded 66.5 million KD, Premier market value reached 51.0 million KD up by + 0.27 % at 8,079.57

#### KSA Market

The market closed up by + 0.71 % at 12,295.91



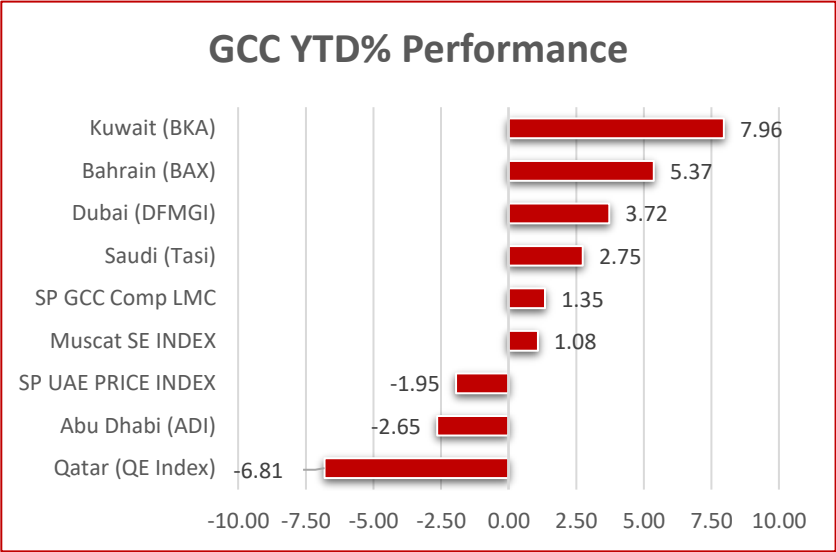
| Description      | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| Blue Chip Watch  |             |       |       |       |        |        |      |       |                |                       |
| Kuwait           |             |       |       |       |        |        |      |       |                |                       |
| NBK              | 0.979       | 0.20  | 0.72  | -0.10 | 9.51   | 9.51   | 1.80 | 14.41 | 3.45           | 7.76                  |
| KFH              | 0.800       | 0.63  | 2.83  | 3.63  | 10.19  | 10.19  | 2.00 | 20.80 | 2.10           | 11.81                 |
| ZAIN             | 0.523       | 0.38  | 1.55  | -0.57 | 3.16   | 3.16   | 1.82 | 10.46 | 6.69           | 2.26                  |
| BOUBYAN BANK     | 0.625       | -0.32 | 0.16  | 1.79  | 4.17   | 4.17   | 2.46 | 33.32 | 0.91           | 2.48                  |
| AGILITY          | 0.611       | -0.81 | 1.33  | 5.34  | 20.04  | 20.04  | 0.88 | 18.53 | 0.00           | 1.64                  |
| Saudi Arabia     |             |       |       |       |        |        |      |       |                |                       |
| ARAMCO           | 30.90       | 1.48  | 0.65  | 0.98  | -6.36  | -6.36  | 4.84 | 15.73 | 4.90           | 7,477.60              |
| SABIC            | 80.00       | 0.63  | 1.14  | 2.70  | -4.19  | -4.19  | 1.38 | 78.04 | 4.25           | 239.99                |
| STC              | 41.20       | -0.24 | -1.90 | 0.98  | 1.98   | 1.98   | 2.60 | 14.95 | 3.88           | 205.99                |
| AL-RAJHI BANK    | 89.80       | -0.11 | 0.34  | 6.90  | 3.82   | 3.82   | 3.36 | 22.73 | 1.98           | 359.19                |
| NCB              | 41.45       | 1.10  | 0.73  | 2.09  | 7.24   | 7.24   | 1.46 | 12.93 | 3.13           | 248.69                |
| Abu Dhabi        |             |       |       |       |        |        |      |       |                |                       |
| ETISALAT.AD      | 18.50       | -0.64 | -0.64 | -3.55 | -5.80  | -5.80  | 3.93 | 15.55 | 4.32           | 160.89                |
| FAB.AD           | 13.80       | 1.17  | 1.17  | -5.74 | -1.15  | -1.15  | 1.22 | 9.67  | 5.14           | 152.46                |
| EMIRATES NBD     | 17.45       | 0.87  | 0.87  | -1.41 | 0.87   | 0.87   | 1.00 | 5.25  | 6.88           | 110.23                |
| DB ISLAMIC DB    | 6.43        | 0.63  | 0.63  | 1.74  | 12.41  | 12.41  | 1.04 | 7.29  | 7.00           | 46.56                 |
| EMAR.DU          | 7.94        | 3.12  | 3.12  | 6.86  | 0.25   | 0.25   | 0.94 | 7.33  | 3.15           | 70.18                 |
| Qatar            |             |       |       |       |        |        |      |       |                |                       |
| QNB              | 14.480      | -2.49 | -3.47 | -6.64 | -12.40 | -12.40 | 1.23 | 9.31  | 4.49           | 133.74                |
| INDUSTREIS QAT   | 12.100      | 1.42  | 3.68  | 0.83  | -7.49  | -7.49  | 1.83 | 15.51 | 6.45           | 73.21                 |
| QA ISLAMIC BK    | 20.300      | 1.20  | 0.30  | 4.10  | -5.58  | -5.58  | 1.63 | 11.74 | 3.57           | 47.97                 |
| MASRAF AL RAYA   | 2.385       | 1.49  | 1.45  | 1.49  | -10.17 | -10.17 | 0.90 | 15.78 | 4.19           | 22.18                 |
| MESAIEED PETRO   | 1.680       | -1.29 | -0.59 | 0.00  | -6.04  | -6.04  | 1.24 | 19.50 | 5.12           | 21.11                 |
| Oman             |             |       |       |       |        |        |      |       |                |                       |
| BANK MUSCAT      | 0.271       | 0.37  | 0.37  | 0.74  | 2.65   | 2.65   | 0.86 | 10.74 | 5.54           | 2.03                  |
| OMANTEL          | 1.078       | -0.28 | -0.28 | -0.19 | 1.70   | 1.70   | 1.26 | 29.82 | 3.01           | 0.81                  |
| BANK DHOFAR      | 0.150       | 0.00  | 0.00  | 0.00  | -6.25  | -6.25  | 0.61 | 16.06 | 5.17           | 0.45                  |
| NAT BANK OF OMAN | 0.243       | 0.00  | 0.00  | -8.65 | -13.21 | -13.21 | 0.59 | 8.77  | 3.50           | 0.40                  |
| OMINVEST         | 0.440       | 2.33  | 2.33  | -2.22 | 4.76   | 4.76   | 0.97 | 12.04 | 3.41           | 0.29                  |

| Foreign Holding |        |        |       |       |         |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 31-January-24   | 24.37% | 14.87% | 0.06% | 2.52% | 0.19%   | 5.56% | 17.79% | 13.09% | 6.24% | 5.19% |
| 7-February-24   | 24.38% | 14.85% | 0.06% | 2.64% | 0.19%   | 5.44% | 17.89% | 13.07% | 6.25% | 5.19% |

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.36 % The leading sector best performance indices today are Technology 2.8 % Consumer Disc 1.96 % Basic materials 1.15 % respectively

KSA

Saudi Armco has a positive performance today by + 1.48 %, SABIC has a positive performance today by + 0.63 %. STC has a negative performance today by – 0.24 %, Al Rajhi Bank has a negative performance today by - 0.11 %

U.A.E

ETISALAT .AD has a negative performance today by - 0.64 %, FAB.AD has a positive performance today by + 1.17 %



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