

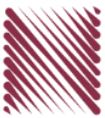


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday , March 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)             | 12,613.9    | 0.46  | 0.29  | -0.13 | 5.40   | 5.40   | 2.44 | 22.17 | 2.96           | 11,267.20             |
| Qatar (QE Index)         | 10,190.7    | 0.00  | -0.39 | -2.71 | -5.91  | -5.91  | 1.20 | 12.07 | 4.64           | 522.88                |
| Dubai (DFMGI)            | 4,252.8     | 0.11  | -0.01 | -1.30 | 4.75   | 4.75   | 1.42 | 8.28  | 5.32           | 604.20                |
| Abu Dhabi (ADI)          | 9,228.6     | -0.04 | -0.06 | -0.28 | -3.65  | -3.65  | 2.49 | 17.04 | 2.12           | 2,569.84              |
| Bahrain (BAX)            | 2,034.2     | 0.43  | 1.08  | 1.44  | 3.18   | 3.18   | 0.81 | 10.64 | 4.65           | 7.45                  |
| Muscat SE INDEX          | 4,772.5     | 0.13  | -0.09 | 4.78  | 5.72   | 5.72   | 0.80 | 10.66 | 5.33           | 6.64                  |
| SP GCC Comp LMC          | 187.9       | 0.24  | -0.01 | -1.36 | 1.58   | 1.58   | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 134.0       | 0.04  | -0.09 | -1.14 | -2.81  | -2.81  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |        |        |      |       |                |                       |
| MSCI World Index         | 3,397.3     | 0.90  | 0.51  | 1.80  | 7.20   | 7.20   |      |       |                |                       |
| U.S. (S&P 500)           | 5,175.3     | 1.12  | 1.01  | 1.55  | 8.50   | 8.50   | 4.28 | 25.37 | 1.76           | 45,231.97             |
| U.K. (FTSE 100)          | 7,747.8     | 1.02  | 1.15  | 1.54  | 0.19   | 0.19   | 1.65 | 12.65 | 3.86           | 2,050.98              |
| Japan (topix)            | 2,657.2     | -0.36 | -2.55 | -0.69 | 12.29  | 12.29  | 1.56 | 14.84 | 2.05           | 952,968.32            |
| <b>Emerging Markets</b>  |             |       |       |       |        |        |      |       |                |                       |
| MSCI EM Index            | 1,049.1     | 0.96  | 1.15  | 2.76  | 2.47   | 2.47   |      |       |                |                       |
| China (SSE Composite)    | 3,055.9     | -0.41 | 0.33  | 1.35  | 2.72   | 2.72   | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 73,668.0    | 0.22  | -0.61 | 1.61  | 1.98   | 1.98   | 4.73 | 23.34 | 1.12           | 146,810.26            |
|                          |             |       |       |       |        |        |      |       |                |                       |
| 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   | 7,473.6     | 0.44  | 0.85  | 0.44  | 9.63   | 9.63   | 1.53 | 15.55 | 3.30           | 44.64                 |
| Kuwait Premier Index     | 8,195.3     | 0.43  | 1.05  | 0.45  | 9.61   | 9.61   | 1.68 | 17.36 | 3.10           | 37.18                 |
| Kuwait Main Index        | 6,112.4     | 0.50  | -0.15 | 0.43  | 9.74   | 9.74   | 1.05 | 9.85  | 4.31           | 7.47                  |
| <b>Kuwait Sector</b>     |             |       |       |       |        |        |      |       |                |                       |
| Banking                  | 1,813.3     | 0.33  | 1.04  | 0.18  | 10.07  | 10.07  | 1.80 | 17.63 | 2.85           | 27.07                 |
| Telecom                  | 1,118.5     | 0.24  | -0.30 | 0.12  | 1.21   | 1.21   | 1.63 | 10.58 | 7.53           | 3.41                  |
| Industrials              | 1,023.3     | 1.06  | 0.64  | 0.79  | 12.71  | 12.71  | 1.13 |       | 2.74           | 3.45                  |
| Financial Services       | 1,388.4     | 0.97  | 0.18  | 0.09  | 14.54  | 14.54  | 1.11 | 13.44 | 3.36           | 4.38                  |
| Real Estate              | 1,331.7     | 0.13  | 2.56  | 4.08  | 9.79   | 9.79   | 1.01 | 15.40 | 1.77           | 2.85                  |
| Basic Materials          | 781.4       | 0.84  | -0.20 | 0.17  | 4.76   | 4.76   | 1.35 | 11.22 | 10.09          | 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         | 723.4       | 0.38  | 0.61  | 1.15  | 9.84   | 9.84   | 1.65 | 17.05 | 1.71           | 0.22                  |
| Insurance                | 2,554.5     | 1.54  | 0.86  | 1.34  | 11.41  | 11.41  | 1.38 | 9.92  | 3.71           | 1.01                  |
| Consumer Discretionary   | 1,659.3     | -0.37 | 0.05  | -0.45 | 3.45   | 3.45   |      |       |                |                       |
| Energy                   | 1,023.1     | 0.93  | -1.96 | -1.08 | 7.81   | 7.81   | 0.78 | 10.19 | 4.97           | 0.21                  |
| Technology               | 1,964.3     | 0.37  | -0.37 | -3.23 | 239.62 | 239.62 | 2.41 |       |                | 0.03                  |
| Utilities                | 444.7       | 0.00  | 0.59  | -0.59 | -2.31  | -2.31  |      |       |                |                       |

### S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices rose in early Asian trading, but price moves were limited as the market waited for monthly reports from oil agencies. Brent futures for May delivery rose 23 cents to \$82.44 a barrel.

#### Kuwait Market

The market closed up by + 0.44 % at 7,473.6 value traded 40.0 million KD, Premier market value reached 29.9 million KD up by + 0.43% at 8,195.3

#### KSA Market

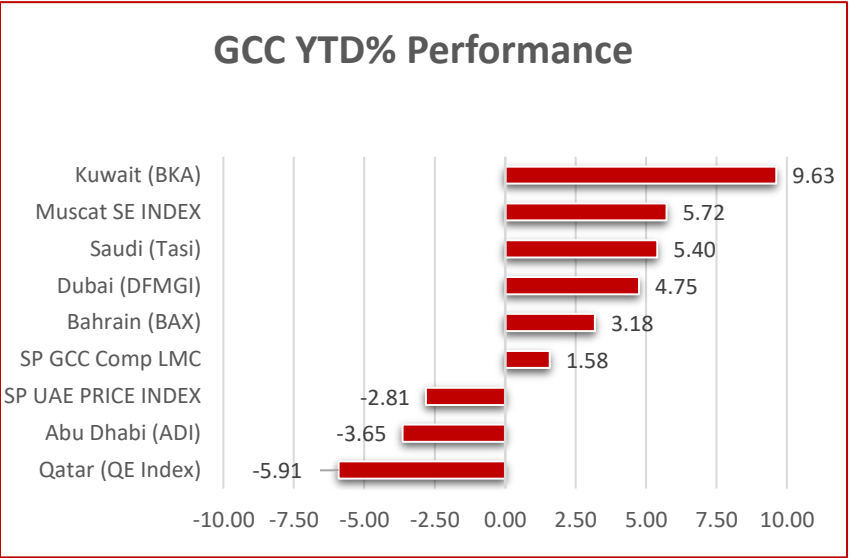
The market closed up by + 0.46 % at 12,613.9



| 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              | 0.816       | 0.49  | 1.37  | 0.74   | 12.40  | 12.40  | 2.04 | 21.21  | 2.45           | 12.82                 |
| ZAIN             | 0.504       | 0.00  | -0.98 | 0.20   | -0.59  | -0.59  | 1.75 | 10.12  | 6.94           | 2.18                  |
| BOUBYAN BANK     | 0.631       | 0.48  | 1.12  | -1.87  | 5.17   | 5.17   | 2.49 | 33.64  | 1.27           | 2.50                  |
| AGILITY          | 0.604       | 2.20  | 0.50  | 0.50   | 18.66  | 18.66  | 0.87 | 18.31  | 0.00           | 1.62                  |
| Saudi Arabia     |             |       |       |        |        |        |      |        |                |                       |
| ARAMCO           | 32.05       | 0.47  | 0.94  | 1.10   | -2.88  | -2.88  | 5.05 | 17.13  | 5.29           | 7,755.89              |
| SABIC            | 78.60       | -0.13 | 0.51  | -0.25  | -5.87  | -5.87  | 1.41 | 180.74 | 4.33           | 235.79                |
| STC              | 40.15       | -0.74 | -2.43 | -5.42  | -0.62  | -0.62  | 2.53 | 15.10  | 3.99           | 200.74                |
| AL-RAJHI BANK    | 85.60       | 0.35  | -0.23 | -3.82  | -1.04  | -1.04  | 3.21 | 21.67  | 2.69           | 342.39                |
| NCB              | 39.75       | -0.38 | -0.62 | -6.14  | 2.85   | 2.85   | 1.34 | 12.30  | 3.26           | 238.49                |
| Abu Dhabi        |             |       |       |        |        |        |      |        |                |                       |
| ETISALAT.AD      | 17.90       | 0.00  | -0.56 | -1.10  | -8.86  | -8.86  | 3.65 | 15.11  | 4.47           | 155.70                |
| FAB.AD           | 13.34       | -0.30 | -0.60 | -2.20  | -4.44  | -4.44  | 1.18 | 9.35   | 5.32           | 147.82                |
| EMIRATES NBD     | 16.95       | 0.00  | -0.59 | -7.38  | -2.02  | -2.02  | 0.98 | 5.10   | 7.08           | 108.01                |
| DB ISLAMIC DB    | 5.78        | 0.52  | 0.00  | -10.25 | 1.05   | 1.05   | 0.94 | 6.55   | 7.79           | 42.29                 |
| EMAR.DU          | 8.21        | 0.00  | 0.49  | 1.11   | 3.66   | 3.66   | 0.98 | 7.58   | 3.05           | 72.57                 |
| Qatar            |             |       |       |        |        |        |      |        |                |                       |
| QNB              | 14.730      | -1.34 | -0.54 | -3.28  | -10.89 | -10.89 | 1.25 | 9.47   | 4.41           | 135.99                |
| INDUSTREIS QAT   | 11.870      | 0.08  | 0.17  | -7.98  | -9.25  | -9.25  | 1.80 | 15.21  | 6.57           | 71.78                 |
| QA ISLAMIC BK    | 19.670      | -0.66 | -1.40 | -2.38  | -8.51  | -8.51  | 1.58 | 11.37  | 3.69           | 46.46                 |
| MASRAF AL RAYA   | 2.556       | 0.63  | 1.67  | 1.03   | -3.73  | -3.73  | 0.97 | 16.91  | 3.91           | 23.76                 |
| MESAIEED PETRO   | 1.870       | 2.58  | 1.41  | -1.06  | 4.59   | 4.59   | 1.38 | 21.70  | 4.60           | 23.48                 |
| Oman             |             |       |       |        |        |        |      |        |                |                       |
| BANK MUSCAT      | 0.272       | 0.37  | 0.37  | 3.82   | 3.03   | 3.03   | 0.87 | 10.78  | 5.70           | 2.04                  |
| OMANTEL          | 1.075       | 0.56  | -1.56 | -0.28  | 1.42   | 1.42   | 1.26 | 29.74  | 5.58           | 0.81                  |
| 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         | 0.397       | 0.51  | 0.51  | 1.79   | -5.48  | -5.48  | 0.87 | 10.87  | 3.78           | 0.27                  |

| 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**  
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Leading Sector, Security Performance

**Kuwait**  
The market is up today by + 0.44 %The leading sector best performance indices today are Insurance 1.54 % Industrials 1.06 % Financial services 0.97 % respectively

**KSA**  
Saudi Armco has a positive performance today by + 0.47 %, SABIC has a negative performance today by - 0.13 %. STC has a negative performance today by – 0.74 %, Al Rajhi Bank has a positive performance today by + 0.35 %

**U.A.E**  
ETISALAT .AD has a flat performance today, FAB.AD has a negative performance today by - 0.30 %



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