

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 12th May 2024



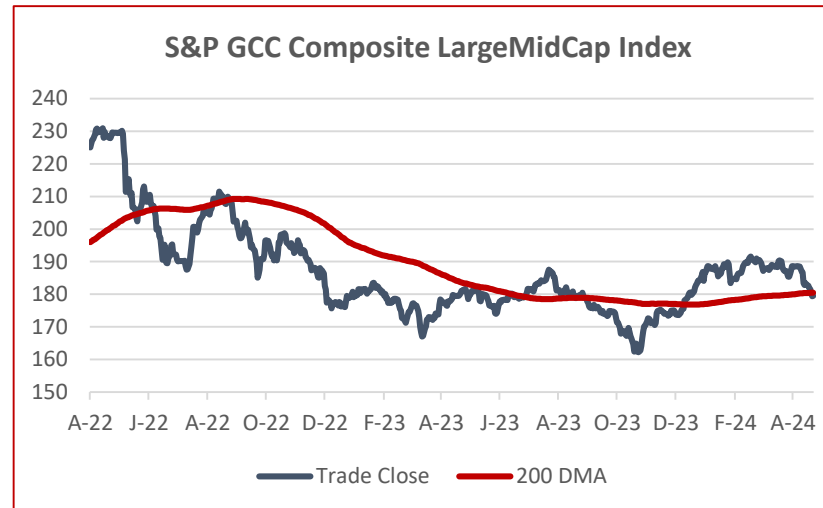


Sunday, May 12, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,217.1	-0.55	-0.55	-1.43	-1.49	2.09	2.32	20.76	3.23	10,683.59
Qatar (QE Index)	9,644.0	0.11	0.11	-0.85	-2.06	-10.96	1.12	10.99	4.92	485.14
Dubai (DFMGI)	4,173.0	-0.16	0.73	0.42	-1.72	2.79	1.37	8.07	5.83	599.37
Abu Dhabi (ADI)	9,090.4	-0.32	0.59	0.25	-1.49	-5.09	2.58	16.13	2.10	2,560.08
Bahrain (BAX)	2,023.2	-0.35	-0.35	-0.29	-0.95	2.62	0.88	10.80	4.23	8.26
Muscat SE INDEX	4,778.5	0.18	0.18	-0.12	3.08	5.86	0.82	10.16	5.69	6.64
SP GCC Comp LMC	179.7	-0.10	-0.10	-1.13	-3.10	-2.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.8	0.00	0.00	-0.25	-2.89	-5.13				
Developed Markets										
MSCI World Index	3,419.9	0.26	1.74	3.47	-0.52	7.91				
U.S. (S&P 500)	5,222.7	0.16	1.85	3.71	-0.60	9.49	4.34	25.66	1.69	46,188.97
U.K. (FTSE 100)	8,433.8	0.63	2.68	3.56	6.05	9.06	1.79	14.43	3.63	2,224.27
Japan (topix)	2,728.2	0.54	-0.01	-0.55	-1.46	15.29	1.50	15.24	2.08	965,169.82
Emerging Markets										
MSCI EM Index	1,071.6	0.76	0.96	2.46	2.73	4.68				
China (SSE Composite)	3,154.5	0.01	1.60	1.60	3.73	6.04	1.36	12.00		44,025.04
India (Sensex)	72,664.5	0.36	-1.64	-2.44	-1.34	0.59	4.71	21.95	1.18	144,395.48

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,179.5	1.39	1.39	1.82	-2.02	5.31	1.45	15.15	3.60	42.66
Kuwait Premier Index	7,846.4	1.68	1.68	2.01	-2.37	4.94	1.57	16.39	3.43	35.14
Kuwait Main Index	5,971.5	-0.03	-0.03	0.87	-0.23	7.21	1.04	10.74	4.43	7.52
Kuwait Sector										
Banking	1,779.2	2.06	2.06	2.80	0.43	8.00	1.73	17.33	3.04	26.11
Telecom	1,042.9	0.23	0.23	-0.08	-2.08	-5.63	1.52	11.32	8.08	3.18
Industrials	756.7	0.50	0.50	-1.50	-27.61	-16.65	0.79	11.51	5.73	2.55
Financial Services	1,348.2	0.21	0.21	1.12	-0.39	11.22	1.07	12.54	2.97	4.51
Real Estate	1,312.0	0.44	0.44	2.03	1.26	8.17	1.00	13.96	2.02	2.78
Basic Materials	833.5	0.27	0.27	-2.46	5.52	11.74	1.43	11.60	9.40	0.47
Health Care	475.0	0.00	0.00	-2.51	38.26	-1.47	1.69	11.92	1.81	
Consumer Staples	867.5	2.43	2.43	4.15	12.27	31.72	1.84	22.09	2.43	0.26
Insurance	2,499.0	0.73	0.73	0.48	-2.66	8.99	1.35	13.00	3.20	1.00
Consumer Discretionary	1,675.5	-0.41	-0.41	-0.28	-4.35	4.46				
Energy	1,060.7	0.32	0.32	-0.11	1.70	11.77	0.87	10.17	5.50	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	413.2	-0.63	-0.63	-5.42	-7.10	-9.25				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell by nearly \$1 a barrel on Friday as comments from U.S. central bank officials indicated higher-for-longer interest rates, which could hinder demand from the world's largest crude consumers. Brent crude futures settled down 1.3% at \$82.79 a barrel.

Kuwait Market

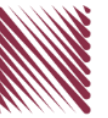
The market closed up by + 1.39% at 7,179.5 value traded 102.0 million KD, Premier market value reached 84.6 million KD up by + 1.68% at 7,846.4.

KSA Market

The market closed down by – 0.55% at 12,217.1.

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	0.882	4.01	4.01	1.97	-2.52	3.59	1.74	13.82	3.78	7.34
KFH	0.744	1.09	1.09	3.33	1.88	11.70	2.18	21.90	2.47	12.71
ZAIN	0.480	0.42	0.42	-1.64	-2.64	-5.33	1.67	9.64	7.29	2.07
BOUBYAN BANK	0.603	1.86	1.86	2.38	3.43	6.53	2.54	32.18	1.25	2.53
AGILITY	0.305	0.00	0.00	-3.48	-16.19	7.69	0.44	9.32	6.56	0.82
Saudi Arabia										
ARAMCO	29.95	0.34	0.34	-0.50	-2.92	-9.24	4.76	16.52	6.26	7,248.09
SABIC	80.00	0.00	0.00	-5.33	2.17	-4.19	1.43	183.95	4.25	240.01
STC	38.35	-0.26	-0.26	1.86	-0.56	-2.53	2.42	14.42	4.17	191.76
AL-RAJHI BANK	79.00	-0.63	-0.63	-1.13	-4.01	-8.67	2.92	19.43	2.91	316.01
NCB	35.70	-0.56	-0.56	-5.05	-11.19	-7.63	1.18	11.02	4.90	214.21
Abu Dhabi										
ETISALAT.AD	16.78	0.00	3.71	-1.29	-8.61	-14.56	3.35	13.97	4.77	145.93
FAB.AD	12.40	-0.64	1.81	-0.64	-6.20	-11.17	1.15	8.62	5.73	136.99
EMIRATES NBD	16.75	0.30	0.30	-1.47	-4.29	-3.18	0.98	4.88	7.16	105.80
DB ISLAMIC DB	5.65	-0.53	0.18	1.62	-3.09	-1.22	0.95	6.29	7.96	40.91
EMAR.DU	8.03	-0.86	2.95	-2.19	-1.71	1.39	0.91	5.98	6.23	70.97
Qatar										
QNB	13.880	-0.29	-0.29	0.07	-2.46	-16.03	1.23	8.77	4.68	128.20
INDUSTREIS QAT	12.120	0.92	0.92	-1.06	1.42	-7.34	2.01	15.17	6.44	73.33
QA ISLAMIC BK	17.740	0.80	0.80	-3.06	-3.32	-17.49	1.46	10.13	4.09	41.92
MASRAF AL RAYA	2.386	0.68	0.68	-5.02	2.84	-10.13	0.92	15.55	4.19	22.19
MESAEED PETRO	1.782	-0.45	-0.45	-7.14	-10.18	-0.34	1.38	22.21	4.83	22.39
Oman										
BANK MUSCAT	0.263	0.00	0.00	0.38	0.38	-0.38	0.86	10.26	5.89	1.97
OMANTEL	1.049	-0.10	-0.10	0.38	1.84	-1.04	1.22	24.04	5.72	0.79
BANK DHOFAR	0.158	0.00	0.00	-1.25	-1.25	-1.25	0.66	15.67	4.91	0.47
NAT BANK OF OMAN	0.273	-0.73	-0.73	6.23	5.00	-2.50	0.66	9.56	3.11	0.44
OMINVEST	0.376	1.08	1.08	-2.08	2.44	-4.88	0.82	7.67	5.32	0.25

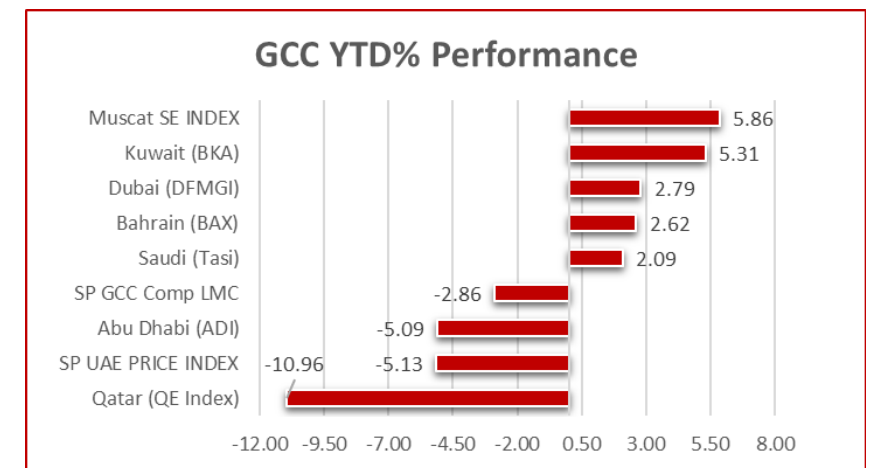
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
01-May-24	24.51%	14.95%	0.06%	2.34%	5.57%	17.89%	12.94%	6.25%	5.44%
08-May-24	24.54%	14.81%	0.06%	2.32%	5.65%	17.88%	12.98%	6.27%	5.45%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 1.39 %The leading sector best performance indices today are Consumer services 2.43 % Banking 2.06 % Insurance 0.73 % respectively

KSA

Saudi Armco has a positive performance today by + 0.34 %, SABIC flat performance today 0 %, STC have negative performance today by -0.26 %, Al Rajhi Bank have negative performance today by -0.63 %.



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