

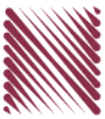


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Thursday, 13<sup>th</sup> June 2024

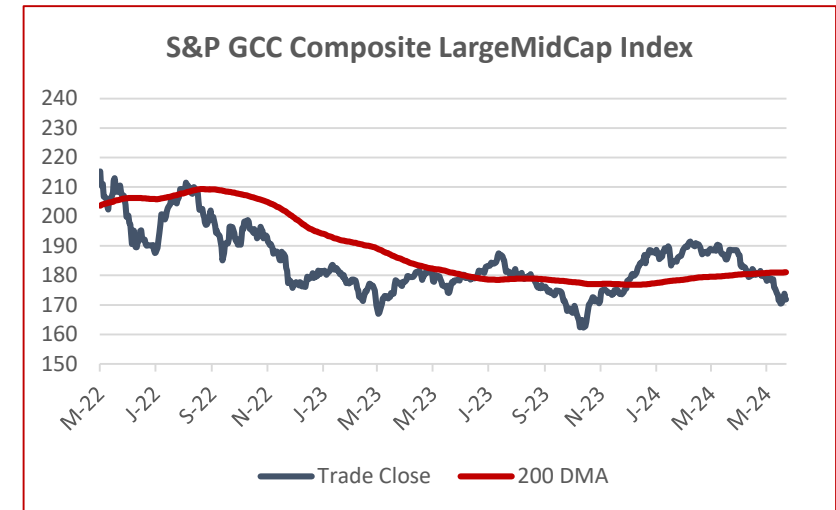




Thursday, June 13, 2024

| * 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)             | 11,498.9    | -1.31 | -0.53 | -0.04 | -7.28  | -3.91  | 2.23 | 19.78 | 3.34           | 9,948.17              |
| Qatar (QE Index)         | 9,667.0     | 0.22  | 1.41  | 3.73  | -1.83  | -10.74 | 1.12 | 11.03 | 4.90           | 486.26                |
| Dubai (DFMGI)            | 3,983.8     | 0.09  | 0.04  | 0.15  | -6.18  | -1.87  | 1.38 | 8.14  | 6.06           | 590.14                |
| Abu Dhabi (ADI)          | 8,932.9     | -0.51 | -0.27 | 0.79  | -3.20  | -6.73  | 2.56 | 15.98 | 2.15           | 2,506.43              |
| Bahrain (BAX)            | 2,040.8     | 0.15  | 0.26  | 0.09  | -0.09  | 3.52   | 0.88 | 11.07 | 4.26           | 8.05                  |
| Muscat SE INDEX          | 4,679.4     | -0.45 | -1.93 | -3.43 | 0.94   | 3.66   | 0.80 | 10.01 | 5.86           | 6.45                  |
| SP GCC Comp LMC          | 172.3       | 0.01  | 0.00  | 0.98  | -7.08  | -6.86  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 125.0       | 0.00  | 0.00  | 0.78  | -7.17  | -9.32  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |        |        |      |       |                |                       |
| MSCI World Index         | 3,522.7     | 0.41  | 0.88  | 2.25  | 2.47   | 11.15  |      |       |                |                       |
| U.S. (S&P 500)           | 5,487.0     | 0.25  | 1.02  | 3.97  | 4.43   | 15.04  | 4.55 | 26.77 | 1.60           | 48,388.83             |
| U.K. (FTSE 100)          | 8,191.3     | 0.60  | 0.55  | -1.02 | 3.00   | 5.92   | 1.74 | 14.68 | 3.72           | 2,139.51              |
| Japan (topix)            | 2,715.8     | 0.58  | -1.12 | -2.05 | -1.91  | 14.76  | 1.42 | 15.04 | 2.13           | 956,201.51            |
| <b>Emerging Markets</b>  |             |       |       |       |        |        |      |       |                |                       |
| MSCI EM Index            | 1,081.8     | 0.71  | 0.46  | 3.13  | 3.70   | 5.67   |      |       |                |                       |
| China (SSE Composite)    | 3,030.2     | 0.48  | -0.08 | -1.83 | -0.36  | 1.86   | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 77,301.1    | 0.40  | 0.40  | 4.52  | 4.96   | 7.01   | 4.87 | 22.81 | 1.14           | 152,519.76            |
|                          |             |       |       |       |        |        |      |       |                |                       |
| 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   | 7,033.6     | -0.05 | -0.16 | -0.26 | -4.01  | 3.17   | 1.44 | 15.07 | 3.65           | 42.30                 |
| Kuwait Premier Index     | 7,654.8     | 0.03  | -0.19 | -0.36 | -4.75  | 2.38   | 1.56 | 16.45 | 3.46           | 35.01                 |
| Kuwait Main Index        | 5,971.6     | -0.44 | -0.05 | 0.23  | -0.23  | 7.22   | 1.04 | 10.34 | 4.55           | 7.29                  |
| <b>Kuwait Sector</b>     |             |       |       |       |        |        |      |       |                |                       |
| Banking                  | 1,735.2     | 0.10  | 0.04  | -0.37 | -2.06  | 5.32   | 1.72 | 17.23 | 3.06           | 25.99                 |
| Telecom                  | 983.3       | -0.60 | -0.33 | -1.38 | -7.68  | -11.03 | 1.44 | 11.72 | 8.55           | 3.00                  |
| Industrials              | 784.7       | 0.12  | 1.65  | 5.82  | -24.93 | -13.57 | 0.83 | 11.75 | 5.50           | 2.66                  |
| Financial Services       | 1,332.9     | 0.40  | -1.02 | -2.01 | -1.52  | 9.96   | 1.08 | 11.96 | 3.02           | 4.40                  |
| Real Estate              | 1,312.7     | -0.66 | -1.55 | -1.03 | 1.32   | 8.23   | 1.00 | 14.04 | 2.04           | 2.79                  |
| Basic Materials          | 829.0       | -0.52 | -2.53 | -1.33 | 4.95   | 11.14  | 1.49 | 14.54 | 10.57          | 0.47                  |
| Health Care              | 442.1       | -3.32 | 2.64  | -0.86 | 28.66  | -8.32  | 1.58 | 10.40 | 1.95           |                       |
| Consumer Staples         | 870.3       | -0.24 | 0.55  | -0.74 | 12.64  | 32.15  | 1.89 | 19.32 | 2.36           | 0.26                  |
| Insurance                | 2,554.6     | -0.80 | 0.31  | 1.75  | -0.50  | 11.42  | 1.39 | 12.58 | 3.11           | 1.03                  |
| Consumer Discretionary   | 1,561.8     | -0.92 | -1.21 | -0.41 | -10.84 | -2.63  |      |       |                |                       |
| Energy                   | 1,037.6     | -0.18 | -5.64 | -2.92 | -0.51  | 9.34   | 0.90 | 9.74  | 6.56           | 0.21                  |
| Technology               | 1,673.3     | 0.00  | -2.54 | -1.71 | -12.21 | 189.31 | 2.06 |       |                | 0.02                  |
| Utilities                | 421.1       | -0.62 | 1.27  | 0.63  | -5.33  | -7.51  |      |       |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

Oil rose slightly in early trade on Wednesday as concern over escalating conflict in Europe and the Middle East offset demand worries following an unexpected build in U.S. crude inventories. Brent crude futures for August delivery rose 6 cents to \$85.39 a barrel.

#### Kuwait Market

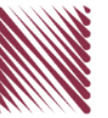
The market closed down by – 0.05% at 7,033.6 value traded 48.8 million KD, Premier market value reached 41.9 million KD up by + 0.03% at 7,654.8.

#### KSA Market

The market closed down by - 1.31% at 11,498.9.

# 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) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |        |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |       |        |        |      |        |                |                       |
| NBK                    | 0.855       | 0.00  | -0.58 | -0.23 | -5.50  | 0.42   | 1.68 | 12.92  | 3.90           | 7.13                  |
| KFH                    | 0.720       | -0.14 | -0.28 | -1.37 | -1.41  | 8.10   | 2.11 | 21.19  | 2.55           | 12.34                 |
| ZAIN                   | 0.447       | 0.00  | -0.67 | -0.22 | -9.33  | -11.83 | 1.56 | 10.15  | 7.83           | 1.94                  |
| BOUBYAN BANK           | 0.576       | -0.52 | -0.52 | -0.52 | -1.20  | 1.76   | 2.42 | 30.74  | 1.31           | 2.42                  |
| AGILITY                | 0.293       | -0.34 | -0.68 | 0.00  | -19.48 | 3.45   | 0.79 | 8.60   | 6.83           | 0.79                  |
| <b>Saudi Arabia</b>    |             |       |       |       |        |        |      |        |                |                       |
| ARAMCO                 | 27.70       | -2.12 | -2.12 | -4.48 | -10.21 | -16.06 | 4.40 | 15.28  | 6.76           | 6,702.33              |
| SABIC                  | 73.50       | -0.68 | -1.34 | -3.29 | -6.13  | -11.98 | 1.32 | 192.80 | 4.49           | 220.46                |
| STC                    | 36.60       | -0.54 | 0.69  | 1.67  | -5.10  | -6.98  | 2.27 | 13.58  | 4.37           | 182.97                |
| AL-RAJHI BANK          | 79.00       | -1.00 | 0.13  | 3.81  | -4.01  | -8.67  | 2.92 | 19.69  | 2.91           | 315.95                |
| NCB                    | 35.15       | 0.14  | -0.85 | 3.84  | -12.56 | -9.06  | 1.16 | 10.85  | 4.98           | 210.87                |
| <b>Abu Dhabi</b>       |             |       |       |       |        |        |      |        |                |                       |
| ETISALAT.AD            | 15.90       | 0.51  | -0.62 | -1.24 | -13.40 | -19.04 | 3.17 | 13.24  | 5.03           | 138.26                |
| FAB.AD                 | 11.58       | -0.17 | -1.86 | -0.17 | -12.41 | -17.05 | 1.07 | 8.05   | 6.13           | 127.91                |
| EMIRATES NBD           | 16.25       | 0.31  | 0.93  | 4.50  | -7.14  | -6.07  | 0.95 | 4.74   | 7.38           | 102.63                |
| DB ISLAMIC DB          | 5.59        | 0.00  | 0.90  | 1.27  | -4.12  | -2.27  | 0.94 | 6.23   | 8.05           | 40.47                 |
| EMAR.DU                | 7.75        | 0.26  | 4.73  | 1.17  | -5.14  | -2.15  | 0.86 | 6.04   | 6.45           | 68.49                 |
| <b>Qatar</b>           |             |       |       |       |        |        |      |        |                |                       |
| QNB                    | 14.180      | 0.57  | 3.73  | 5.04  | -0.35  | -14.22 | 1.25 | 8.96   | 4.58           | 130.97                |
| INDUSTREIS QAT         | 12.180      | 0.25  | 2.10  | 5.45  | 1.92   | -6.88  | 2.02 | 15.24  | 6.40           | 73.69                 |
| QA ISLAMIC BK          | 17.780      | 0.17  | 0.57  | 3.37  | -3.11  | -17.30 | 1.47 | 10.16  | 4.08           | 42.01                 |
| MASRAF AL RAYA         | 2.355       | 0.21  | 1.07  | 2.26  | 1.51   | -11.30 | 0.91 | 15.35  | 4.25           | 21.90                 |
| MESAIEED PETRO         | 1.708       | -0.58 | 0.18  | -0.70 | -13.91 | -4.47  | 1.32 | 21.29  | 5.04           | 21.46                 |
| <b>Oman</b>            |             |       |       |       |        |        |      |        |                |                       |
| BANK MUSCAT            | 0.251       | 0.40  | -0.79 | -3.09 | -4.20  | -4.92  | 0.82 | 9.79   | 6.18           | 1.88                  |
| OMANTEL                | 1.016       | -2.31 | -3.70 | -3.88 | -1.36  | -4.15  | 1.24 | 11.47  | 5.91           | 0.76                  |
| BANK DHOFAR            | 0.153       | 0.00  | 0.00  | -2.55 | -4.38  | -4.38  | 0.64 | 15.18  | 5.07           | 0.46                  |
| NAT BANK OF OMAN       | 0.257       | 0.00  | -6.88 | -8.21 | -1.15  | -8.21  | 0.62 | 9.00   | 3.31           | 0.42                  |
| OMINVEST               | 0.365       | -3.69 | -3.95 | -5.19 | -0.56  | -7.66  | 0.77 | 7.93   | 5.48           | 0.24                  |

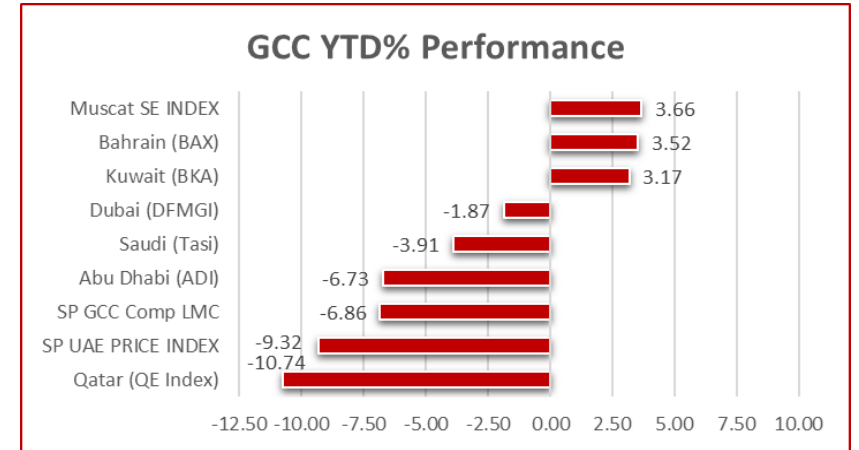
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 05-June-24      | 24.52% | 14.12% | 0.06% | 2.34% | 6.02% | 17.73% | 13.10% | 6.11% | 5.54% |
| 05-June-24      | 24.49% | 13.84% | 0.06% | 2.36% | 6.10% | 17.72% | 13.07% | 6.07% | 5.60% |

### 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 down today by -0.05 %The leading sector bottom performance indices today are Health care -3.32 % Consumer Disc -0.92 % Insurance -0.8 % respectively.

#### KSA

Saudi Armco have negative performance today by -2.12 %, SABIC have negative performance today by -0.67%, STC have negative performance today by -0.54 %, Al Rajhi Bank have negative performance today by -1 %.



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