



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , 14th April 2024





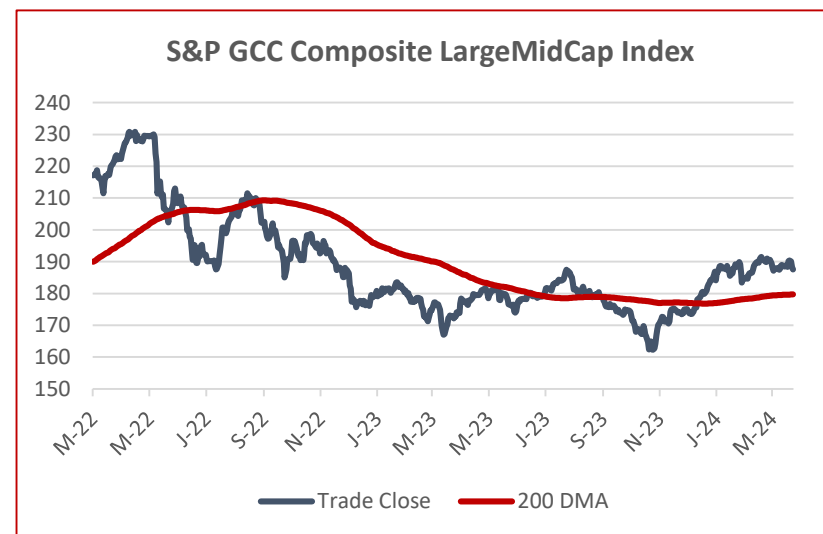
Sunday, April 14, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,666.9	-0.30	-0.30	2.14	2.14	5.85	2.42	21.64	3.00	10,984.64
Qatar (QE Index)	9,844.4	-0.80	-0.80	-0.03	-0.03	-9.11	1.14	11.25	4.82	495.13
Dubai (DFMGI)	4,244.2	-0.06	-0.05	-0.05	-0.05	4.54	1.38	8.32	5.70	604.55
Abu Dhabi (ADI)	9,237.3	0.00	0.00	0.10	0.10	-3.56	2.62	17.37	2.07	2,608.66
Bahrain (BAX)	2,040.4	0.90	0.93	-0.11	-0.11	3.50	0.87	10.61	4.28	8.21
Muscat SE INDEX	4,700.6	0.08	0.08	1.40	1.40	4.13	0.79	10.29	5.52	6.53
SP GCC Comp LMC	187.0	-0.79	-0.79	0.89	0.89	1.13	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.4	0.00	0.00	0.53	0.53	-1.79				

Developed Markets										
MSCI World Index	3,351.0	-1.18	-1.51	-2.52	-2.52	5.74				
U.S. (S&P 500)	5,123.4	-1.46	-1.56	-2.49	-2.49	7.41	4.27	25.44	1.78	45,379.23
U.K. (FTSE 100)	7,995.6	0.91	1.07	0.54	0.54	3.39	1.70	13.17	3.72	2,115.01
Japan (topix)	2,759.6	0.46	2.11	-0.32	-0.32	16.62	1.62	15.40	1.97	981,972.20
Emerging Markets										
MSCI EM Index	1,041.7	-1.27	-0.38	-0.14	-0.14	1.75				
China (SSE Composite)	3,019.5	-0.49	-1.62	-0.71	-0.71	1.50	1.36	12.00		44,025.04
India (Sensex)	74,244.9	-1.06	0.00	0.81	0.81	2.77	4.81	23.67	1.11	147,133.90

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,117.0	-0.98	-0.98	-2.87	-2.87	4.40	1.47	15.37	3.55	43.30
Kuwait Premier Index	7,780.4	-1.01	-1.01	-3.19	-3.19	4.06	1.60	17.00	3.32	35.80
Kuwait Main Index	5,910.9	-0.83	-0.83	-1.25	-1.25	6.13	1.04	10.05	4.72	7.50
Kuwait Sector										
Banking	1,730.7	-0.81	-0.81	-2.31	-2.31	5.05	1.73	17.63	3.04	26.13
Telecom	1,037.6	-0.81	-0.81	-2.58	-2.58	-6.12	1.53	9.92	8.04	3.20
Industrials	956.5	-1.51	-1.51	-8.50	-8.50	5.35	1.02	15.26	3.62	3.31
Financial Services	1,298.8	-1.36	-1.36	-4.04	-4.04	7.14	1.05	12.87	3.79	4.40
Real Estate	1,280.7	-1.65	-1.65	-1.15	-1.15	5.59	1.00	13.83	2.04	2.77
Basic Materials	779.0	-1.62	-1.62	-1.39	-1.39	4.43	1.36	11.05	9.87	0.45
Health Care	323.3	2.13	2.13	-5.90	-5.90	-32.94	1.13	7.94	2.72	
Consumer Staples	793.9	0.04	0.04	2.74	2.74	20.54	1.72	20.70	1.55	0.24
Insurance	2,559.0	0.06	0.06	-0.33	-0.33	11.61	1.39	13.51	3.32	1.03
Consumer Discretionary	1,714.4	-1.79	-1.79	-2.12	-2.12	6.89				
Energy	1,016.6	-2.60	-2.60	-2.53	-2.53	7.13	0.81	10.03	4.83	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	-7.10	-7.10	-9.25				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell at Asia's open on Monday, as market participants dialed back risk premiums following Iran's attack on Israel late on Saturday which the Israeli government said caused limited damage. Brent futures for June delivery fell 24 cents to \$90.21 a barrel.

Kuwait Market

The market closed down by – 0.98% at 7,117.0 value traded 39.9 million KD, Premier market value reached 34.0 million KD down by – 1.01% at 7,780.4.

KSA Market

The market closed down by – 0.3% at 12,666.9.

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)
Blue Chip Watch										
Kuwait										
NBK	0.866	-0.69	-0.69	-4.28	-4.28	1.71	1.75	14.05	3.85	7.21
KFH	0.723	-1.09	-1.09	-1.00	-1.00	8.55	2.15	20.82	2.54	12.37
ZAIN	0.476	-0.63	-0.63	-3.45	-3.45	-6.11	1.65	9.56	7.35	2.06
BOUBYAN BANK	0.612	-0.49	-0.49	-0.97	-0.97	2.00	2.41	32.62	1.31	2.42
AGILITY	0.538	-3.24	-3.24	-17.74	-17.74	5.70	0.77	16.43	1.86	1.44
Saudi Arabia										
ARAMCO	30.60	0.99	0.99	-0.81	-0.81	-7.27	4.82	16.35	5.54	7,405.00
SABIC	85.90	-2.83	-2.83	9.71	9.71	2.87	1.54	197.52	3.96	257.69
STC	39.65	1.80	1.80	0.13	0.13	-1.86	2.50	14.91	4.04	198.24
AL-RAJHI BANK	83.30	-1.42	-1.42	1.22	1.22	-3.70	3.12	21.09	2.76	333.19
NCB	39.85	-3.28	-3.28	-0.87	-0.87	3.10	1.35	12.33	4.39	239.09
Abu Dhabi										
ETISALAT.AD	18.38	0.00	0.11	0.11	0.11	-6.42	3.75	15.51	4.35	159.85
FAB.AD	13.36	-0.30	1.06	1.06	1.06	-4.30	1.18	9.36	5.31	147.60
EMIRATES NBD	17.55	2.33	0.29	0.29	0.29	1.45	1.01	5.28	6.84	110.86
DB ISLAMIC DB	5.76	0.00	-1.20	-1.20	-1.20	0.70	0.93	6.53	7.81	41.71
EMAR.DU	8.50	0.00	4.04	4.04	4.04	7.32	0.97	6.33	5.88	75.13
Qatar										
QNB	14.160	-1.19	-1.19	-0.49	-0.49	-14.34	1.25	8.94	4.59	130.70
INDUSTREIS QAT	12.540	-1.26	-1.26	4.94	4.94	-4.13	1.90	16.07	6.22	75.81
QA ISLAMIC BK	18.550	-0.64	-0.64	1.09	1.09	-13.72	1.49	10.73	3.91	43.80
MASRAF AL RAYA	2.480	-0.80	-0.80	6.90	6.90	-6.59	0.94	16.41	4.03	23.05
MESAIEED PETRO	1.885	-2.13	-2.13	-4.99	-4.99	5.43	1.39	21.88	4.56	23.67
Oman										
BANK MUSCAT	0.265	0.00	0.00	1.15	1.15	0.38	0.84	10.50	5.85	1.99
OMANTEL	1.039	-1.52	-1.52	0.87	0.87	-1.98	1.22	28.74	5.77	0.78
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.261	-1.88	-1.88	0.38	0.38	-6.79	0.63	9.36	3.26	0.42
OMINVEST	0.409	2.00	2.00	4.87	4.87	-2.62	0.90	11.20	4.89	0.27

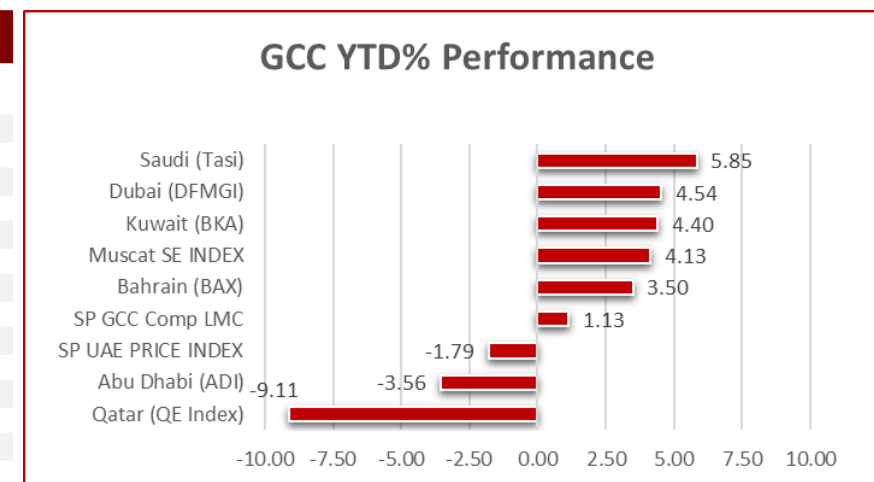
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
3-April-24	24.59%	15.01%	0.06%	2.5%	5.76%	17.96%	12.82%	6.29%	5.38%
10-April-24	24.61%	14.98%	0.06%	2.49%	5.79%	17.96%	12.85%	6.30%	5.38%

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 -0.98 %The leading sector bottom performance indices today are Energy -2.6 % Consumer Disc -1.79 % Real estate -1.65 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.99 %, SABIC have negative performance today by -2.8%, STC has a positive performance today by + 1.8 %, Al Rajhi Bank have negative performance today by -1.42 %



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