

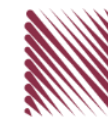


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 14, 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)
GCC Markets										
Saudi (Tasi)	12,728.5	0.04	1.20	0.77	6.36	6.36	2.46	22.21	2.93	11,119.92
Qatar (QE Index)	10,256.1	0.63	0.25	-2.09	-5.31	-5.31	1.21	12.14	4.61	525.81
Dubai (DFMGI)	4,262.5	-0.65	0.22	-1.07	4.99	4.99	1.38	8.38	5.69	608.76
Abu Dhabi (ADI)	9,221.4	-0.36	-0.14	-0.36	-3.72	-3.72	2.49	17.03	2.13	2,571.64
Bahrain (BAX)	2,046.8	0.19	1.71	2.06	3.82	3.82	0.81	10.70	4.62	7.51
Muscat SE INDEX	4,785.5	0.62	0.18	5.06	6.01	6.01	0.80	10.64	5.43	6.65
SP GCC Comp LMC	188.8	-0.10	0.47	-0.88	2.07	2.07	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.5	-0.47	0.33	-0.72	-2.40	-2.40				

Developed Markets										
MSCI World Index	3,363.0	-0.58	-0.51	0.77	6.12	6.12				
U.S. (S&P 500)	5,117.1	-0.65	-0.13	0.41	7.28	7.28	4.27	25.37	1.76	45,237.38
U.K. (FTSE 100)	7,727.4	-0.20	0.88	1.28	-0.08	-0.08	1.65	12.67	3.87	2,044.90
Japan (topix)	2,670.8	0.35	-2.05	-0.18	12.86	12.86	1.57	14.91	2.04	956,651.77

Emerging Markets										
MSCI EM Index	1,034.7	-1.33	-0.23	1.35	1.07	1.07				
China (SSE Composite)	3,054.6	0.54	0.28	1.31	2.68	2.68	1.36	12.00		44,025.04
India (Sensex)	72,643.4	-0.62	-1.99	0.20	0.56	0.56	4.66	23.03	1.13	144,701.38

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,443.2	-0.20	0.44	0.04	9.18	9.18	1.53	15.54	3.31	44.67
Kuwait Premier Index	8,149.4	-0.26	0.48	-0.12	8.99	8.99	1.68	17.31	3.11	37.13
Kuwait Main Index	6,135.2	0.11	0.22	0.81	10.15	10.15	1.06	9.96	4.27	7.54
Kuwait Sector										
Banking	1,802.8	-0.28	0.45	-0.41	9.43	9.43	1.79	17.56	2.86	27.00
Telecom	1,123.7	0.69	0.16	0.58	1.68	1.68	1.64	10.66	7.48	3.43
Industrials	1,023.5	-0.41	0.66	0.82	12.74	12.74	1.13	15.85	2.76	3.49
Financial Services	1,389.0	-0.35	0.22	0.13	14.58	14.58	1.12	13.57	3.33	4.43
Real Estate	1,306.9	-0.67	0.65	2.14	7.75	7.75	0.99	15.27	1.80	2.81
Basic Materials	781.5	0.03	-0.18	0.19	4.77	4.77	1.36	11.11	10.00	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	715.2	0.00	-0.53	0.00	8.60	8.60	1.55	18.66	1.72	0.22
Insurance	2,557.6	0.14	0.98	1.46	11.55	11.55	1.40	9.84	3.65	1.03
Consumer Discretionary	1,671.9	0.64	0.81	0.31	4.24	4.24				
Energy	1,033.6	-0.16	-0.96	-0.06	8.91	8.91	0.79	10.41	4.87	0.22
Technology	1,949.7	0.00	-1.11	-3.94	237.11	237.11	2.41			0.03
Utilities	447.4	0.59	1.19	0.00	-1.73	-1.73				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

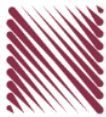
Crude oil futures fell slightly Friday but gained for the week after rising in the two previous sessions. The West Texas Intermediate contract for April fell 22 cents, or 0.27%, to settle at \$81.04 a barrel. The Brent contract for May lost 8 cents, or 0.09%, to settle at \$85.34 a barrel.

Kuwait Market

The market closed down by – 0.20 % at 7,443.2 value traded 79.7 million KD, Premier market value reached 70.3 million KD down by - 0.26% at 8,149.4.

KSA Market

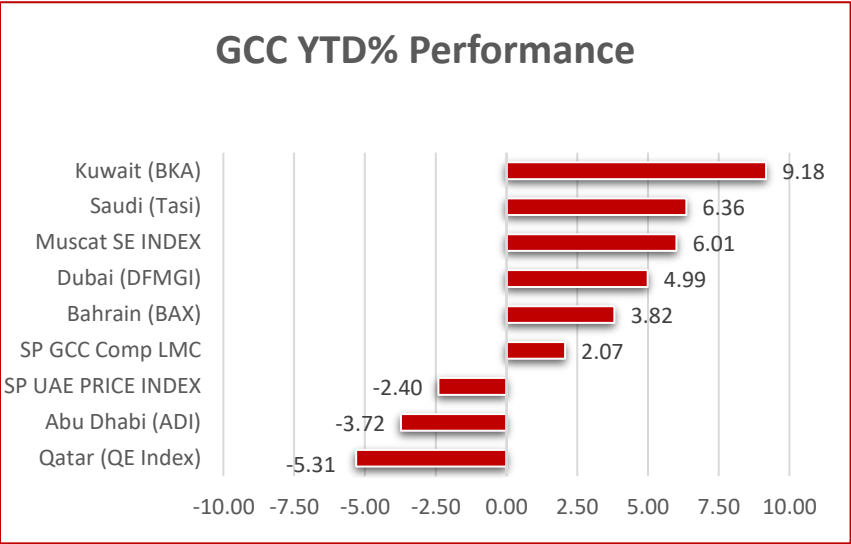
The market closed up by + 0.04 % at 12,728.5.



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.967	-0.31	0.31	-1.33	8.17	8.17	1.77	14.24	3.62	7.70
KFH	0.811	-0.25	0.75	0.12	11.71	11.71	2.03	21.08	2.47	12.76
ZAIN	0.508	1.20	-0.20	0.99	0.20	0.20	1.76	10.20	6.89	2.19
BOUBYAN BANK	0.623	-0.48	-0.16	-3.11	3.83	3.83	2.46	33.21	1.28	2.49
AGILITY	0.605	-0.33	0.67	0.67	18.86	18.86	0.87	18.34	0.00	1.61
Saudi Arabia										
ARAMCO	31.25	-2.50	-1.57	-1.42	-5.30	-5.30	4.93	16.70	5.42	7,562.50
SABIC	77.40	-0.64	-1.02	-1.78	-7.31	-7.31	1.39	177.98	4.39	232.20
STC	39.75	-0.25	-3.40	-6.36	-1.61	-1.61	2.51	14.95	4.03	198.75
AL-RAJHI BANK	86.20	-0.81	0.47	-3.15	-0.35	-0.35	3.23	21.82	2.67	344.80
NCB	38.85	-2.02	-2.87	-8.26	0.52	0.52	1.31	12.02	3.34	233.10
Abu Dhabi										
ETISALAT.AD	18.00	1.78	1.78	1.22	-6.72	-6.72	3.73	15.46	4.37	159.33
FAB.AD	13.12	-0.30	-2.53	-4.11	-6.30	-6.30	1.15	9.17	5.43	144.50
EMIRATES NBD	17.80	1.42	4.40	-2.73	2.89	2.89	1.02	5.36	6.74	112.44
DB ISLAMIC DB	5.76	-1.87	-0.35	-10.56	0.70	0.70	0.93	6.53	7.81	41.71
EMAR.DU	8.22	-0.48	0.61	1.23	3.79	3.79	0.98	7.58	6.08	72.65
Qatar										
QNB	14.800	0.68	-0.07	-2.82	-10.47	-10.47	1.25	9.52	4.39	136.70
INDUSTREIS QAT	11.920	0.51	0.59	-7.60	-8.87	-8.87	1.80	15.28	6.54	72.36
QA ISLAMIC BK	19.620	0.00	-1.65	-2.63	-8.74	-8.74	1.58	11.34	3.70	46.69
MASRAF AL RAYA	2.570	0.39	2.23	1.58	-3.20	-3.20	0.97	17.00	3.89	23.89
MESAIEED PETRO	1.929	2.44	4.61	2.06	7.89	7.89	1.42	22.39	4.46	24.23
Oman										
BANK MUSCAT	0.271	0.00	0.00	3.44	2.65	2.65	0.86	10.74	5.72	2.04
OMANTEL	1.085	0.93	-0.64	0.65	2.36	2.36	1.27	30.01	5.53	0.81
BANK DHOFAR	0.158	3.95	5.33	8.97	-1.25	-1.25	0.65	16.92	4.91	0.47
NAT BANK OF OMAN	0.275	5.77	5.77	9.13	-1.79	-1.79	0.66	9.87	3.09	0.45
OMINVEST	0.390	-1.76	-1.27	0.00	-7.14	-7.14	0.86	10.68	3.85	0.26

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
6-March-24	24.55%	15.02%	0.06%	2.62%	5.53%	17.86%	12.76%	6.32%	5.28%
13-March-24	24.54%	15.08%	0.06%	2.61%	5.58%	17.90%	12.77%	6.32%	5.32%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is down today by -0.2 %The leading sector bottom performance indices today are Real estate -0.67 % Industrials -0.41 % Financial services -0.35 % respectively

KSA
Saudi Armco have negative performance today by -2.5 %, SABIC have negative performance today by -0.64%. STC have negative performance today by -0.25 %, Al Rajhi Bank have negative performance today by -0.81 %

U.A.E
ETISALAT .AD has a positive performance today by + 2.58 %, FAB.AD have negative performance today by -2.1 %



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