

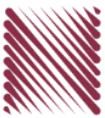


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 15, 2024

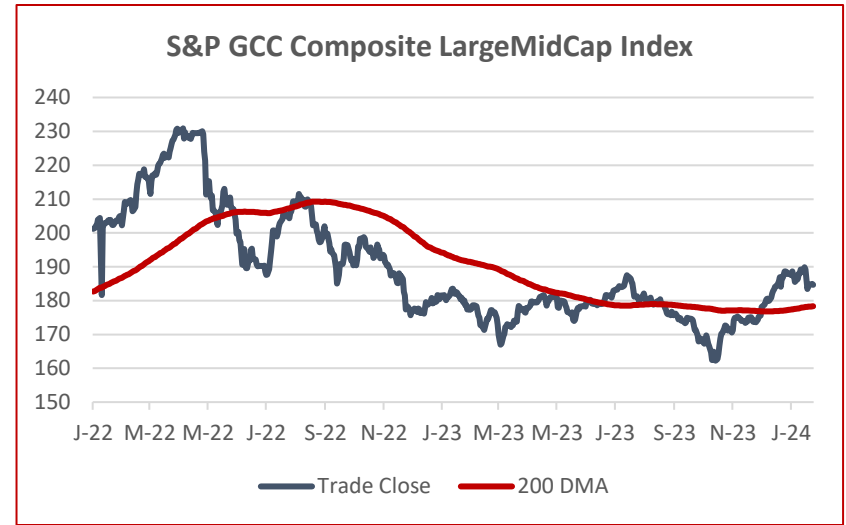




Thursday, February 15, 2024

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,484.6	0.37	2.31	5.83	4.32	4.32	2.38	21.15	2.78	11,199.15
Qatar (QE Index)	10,154.5	-0.57	1.95	0.65	-6.24	-6.24	1.20	12.03	4.59	521.06
Dubai (DFMGI)	4,258.8	0.47	1.79	2.15	4.90	4.90	1.45	8.41	5.14	614.69
Abu Dhabi (ADI)	9,427.0	0.23	0.89	-0.86	-1.57	-1.57	2.65	20.10	2.11	2,604.93
Bahrain (BAX)	2,067.5	-0.57	-0.03	0.02	4.87	4.87	0.83	10.59	3.92	7.58
Muscat SE INDEX	4,630.0	-0.01	1.83	1.49	2.57	2.57	0.79	10.37	4.84	6.46
SP GCC Comp LMC	189.8	0.13	1.85	3.50	2.63	2.63	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.0	0.53	2.54	0.36	0.14	0.14				
Developed Markets										
MSCI World Index	3,285.1	-0.14	0.11	2.49	3.66	3.66				
U.S. (S&P 500)	5,005.6	-0.48	-0.42	3.30	4.94	4.94	4.37	25.15	1.82	44,264.27
U.K. (FTSE 100)	7,711.7	1.50	1.84	1.06	-0.28	-0.28	1.65	11.80	3.85	2,041.48
Japan (topix)	2,624.7	1.27	2.61	2.89	10.92	10.92	1.55	14.67	2.07	942,276.87
Emerging Markets										
MSCI EM Index	1,016.2	0.85	2.08	4.14	-0.73	-0.73				
China (SSE Composite)	2,865.9	1.28	4.97	2.77	-3.67	-3.67	1.36	12.00		44,025.04
India (Sensex)	72,426.6	0.52	1.16	0.94	0.26	0.26	4.64	22.97	1.14	144,691.11

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,333.7	0.03	1.07	0.90	7.58	7.58	1.54	15.56	3.08	48.17
Kuwait Premier Index	8,039.4	-0.02	0.98	1.00	7.52	7.52	1.69	17.34	2.95	40.02
Kuwait Main Index	6,007.7	0.28	1.49	0.58	7.86	7.86	1.05	9.99	3.74	8.16
Kuwait Sector										
Banking	1,777.9	-0.17	0.90	1.23	7.92	7.92	1.78	17.64	2.64	30.74
Telecom	1,133.6	0.12	0.08	-4.78	2.57	2.57	1.68	10.73	6.38	3.48
Industrials	1,018.8	0.51	1.31	3.42	12.22	12.22	1.15	15.74	2.80	3.52
Financial Services	1,351.9	0.00	-0.29	-0.47	11.52	11.52	1.08	13.38	3.45	4.30
Real Estate	1,275.2	0.61	3.27	4.23	5.14	5.14	0.97	14.92	1.80	2.74
Basic Materials	764.0	-0.35	2.34	0.55	2.42	2.42	1.33	11.06	10.23	0.43
Health Care	479.4	0.00	0.00	-0.63	-0.57	-0.57	1.74	12.03	1.74	0.24
Consumer Staples	704.2	2.60	0.00	-0.14	6.93	6.93	1.61	15.01	1.75	0.21
Insurance	2,320.4	-0.68	0.51	-1.73	1.20	1.20	1.31	7.87	4.02	0.94
Consumer Discretionary	1,657.8	2.16	7.78	4.74	3.36	3.36				
Energy	1,077.8	-0.06	4.63	5.37	13.58	13.58	0.82	10.83	4.67	0.22
Technology	2,102.5	-0.35	-0.35	4.33	263.52	263.52	2.59			0.03
Utilities	434.2	0.61	0.61	-2.94	-4.62	-4.62				



What Move the GCC markets

Oil Prices

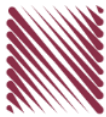
Oil prices eased in early trade on Thursday after a data showed that U.S. crude inventories jumped much more than expected, raising concerns about demand in the world's largest economy. Brent crude futures fell 34 cents, or 0.4%, to \$81.26 a barrel

Kuwait Market

The market closed up by + 0.03 % at 7,333.7 value traded 69.6 million KD, Premier market value reached 48.6 million KD down by – 0.02 % at 8,039.4

KSA Market

The market closed up by + 0.37 % at 12,484.6



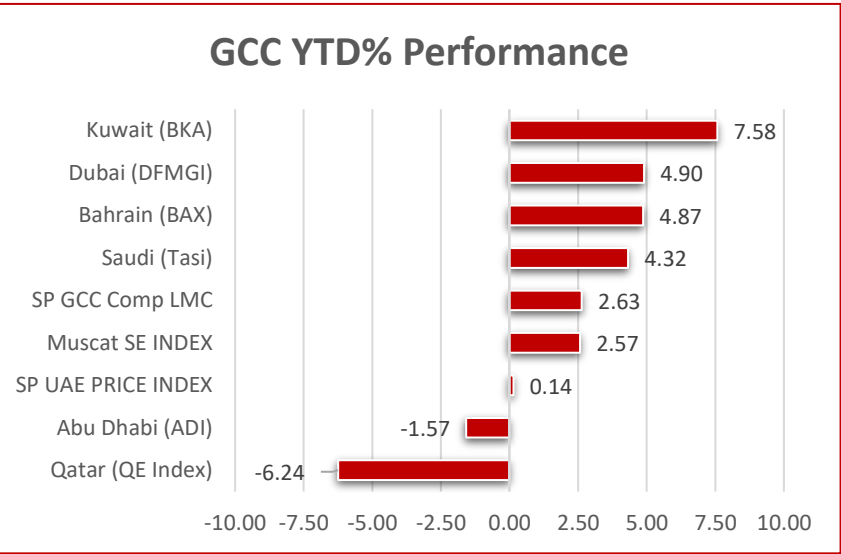
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.977	0.10	0.51	-0.31	9.28	9.28	1.79	14.38	3.58	7.75
KFH	0.786	-0.38	1.03	1.81	8.26	8.26	1.97	20.43	2.14	12.34
ZAIN	0.514	0.19	-0.19	-2.28	1.38	1.38	1.78	10.28	6.81	2.22
BOUBYAN BANK	0.620	0.00	-0.64	0.98	3.33	3.33	2.44	33.05	0.91	2.46
AGILITY	0.607	0.17	0.66	4.66	19.25	19.25	0.87	18.41	0.00	1.62
Saudi Arabia										
ARAMCO	31.95	0.00	4.07	4.41	-3.18	-3.18	5.00	16.26	4.74	7,731.90
SABIC	79.00	0.51	-0.13	1.41	-5.39	-5.39	1.36	77.06	4.30	237.00
STC	41.65	0.73	-0.83	2.08	3.09	3.09	2.63	15.11	3.84	208.25
AL-RAJHI BANK	89.70	-0.44	0.22	6.79	3.70	3.70	3.36	22.71	1.98	358.80
NCB	41.95	0.36	1.94	3.33	8.54	8.54	1.42	12.98	3.09	251.70
Abu Dhabi										
ETISALAT.AD	19.08	-0.42	2.04	-0.94	-3.26	-3.26	4.04	15.97	4.21	165.24
FAB.AD	14.50	0.55	6.89	-0.41	4.44	4.44	1.28	10.22	4.87	161.07
EMIRATES NBD	18.20	1.68	5.20	2.82	5.20	5.20	1.05	5.48	6.59	114.96
DB ISLAMIC DB	6.53	0.77	2.19	3.32	14.16	14.16	1.06	7.40	6.89	47.28
EMAR.DU	8.18	1.61	6.23	10.09	3.28	3.28	0.97	7.55	3.06	72.30
Qatar										
QNB	14.840	1.30	-1.07	-4.32	-10.22	-10.22	1.26	9.54	4.38	137.07
INDUSTREIS QAT	12.020	-1.31	3.00	0.17	-8.10	-8.10	1.82	15.41	6.49	72.72
QA ISLAMIC BK	20.460	-1.21	1.09	4.92	-4.84	-4.84	1.64	11.83	3.54	48.35
MASRAF AL RAYA	2.407	-0.74	2.38	2.43	-9.34	-9.34	0.91	15.92	4.15	22.39
MESAIEED PETRO	1.730	-0.40	2.37	2.98	-3.24	-3.24	1.27	20.08	4.97	21.73
Oman										
BANK MUSCAT	0.27	0.00	0.00	0.37	2.27	2.27	0.86	10.70	5.56	2.03
OMANTEL	1.080	0.00	-0.09	0.00	1.89	1.89	1.27	29.88	3.01	0.81
BANK DHOFAR	0.150	0.00	0.00	0.00	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.270	1.12	11.11	1.50	-3.57	-3.57	0.66	9.75	3.15	0.44
OMINVEST	0.439	-0.23	2.09	-2.44	4.52	4.52	0.97	12.02	3.42	0.29

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-February-24	24.38%	14.85%	0.06%	2.64%	0.19%	5.44%	17.89%	13.07%	6.25%	5.19%
14-February-24	24.44%	14.80%	0.06%	2.69%	0.19%	5.46%	17.90%	13.20%	6.26%	5.21%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.03 % The leading sector top performance indices today are Consumer Staples + 2.60 % Consumer Discretionary + 2.16 % Real estate & Utilities + 0.61 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by + 0.51 %. STC has a positive performance today by + 0.73 %, Al Rajhi Bank has a negative performance today by – 0.44 %

U.A.E

ETISALAT .AD has a negative performance today by - 0.42 %, FAB.AD has a positive performance today by + 0.55 %



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