

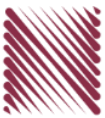


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday ,16th April 2024

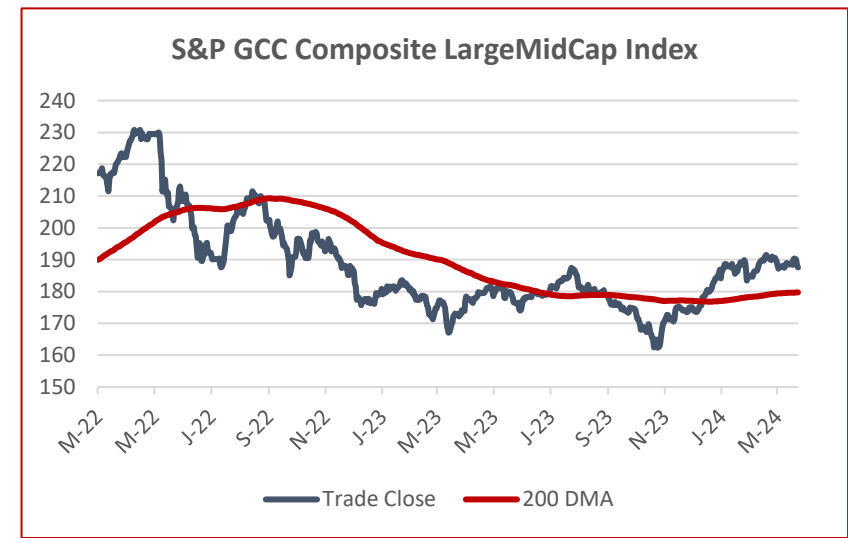




Tuesday, April 16, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,500.4	-1.64	-1.61	0.80	0.80	4.45	2.38	21.34	3.05	10,779.69
Qatar (QE Index)	9,853.2	-0.69	-0.72	0.06	0.06	-9.03	1.14	11.26	4.82	495.53
Dubai (DFMGI)	4,184.3	-1.40	-1.41	-1.46	-1.46	3.07	1.36	8.20	5.78	595.59
Abu Dhabi (ADI)	9,194.3	-0.64	-0.46	-0.37	-0.37	-4.00	2.61	17.27	2.08	2,599.18
Bahrain (BAX)	2,042.1	0.10	0.08	-0.03	-0.03	3.58	0.88	10.73	4.23	8.31
Muscat SE INDEX	4,737.6	0.21	0.87	2.20	2.20	4.95	0.80	10.56	5.47	6.60
SP GCC Comp LMC	183.4	-1.79	-2.70	-1.05	-1.05	-0.81	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.4	-1.35	-1.46	-0.93	-0.93	-3.22				
Developed Markets										
MSCI World Index	3,297.1	-0.62	-1.61	-4.09	-4.09	4.04				
U.S. (S&P 500)	5,051.4	-0.21	-1.41	-3.86	-3.86	5.90	4.21	25.12	1.80	44,832.17
U.K. (FTSE 100)	7,820.4	-1.82	-2.19	-1.66	-1.66	1.13	1.66	12.88	3.81	2,068.13
Japan (topix)	2,697.1	-2.04	-2.27	-2.58	-2.58	13.98	1.58	15.05	2.02	959,578.91
Emerging Markets										
MSCI EM Index	1,009.8	-2.03	-3.06	-3.20	-3.20	-1.36				
China (SSE Composite)	3,007.1	-1.65	-0.41	-1.12	-1.12	1.08	1.36	12.00		44,025.04
India (Sensex)	72,943.7	-0.62	-1.75	-0.96	-0.96	0.97	4.73	23.23	1.13	144,639.66
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,930.2	-2.54	-3.57	-5.42	-5.42	1.66	1.45	15.23	3.59	42.86
Kuwait Premier Index	7,569.2	-2.75	-3.69	-5.82	-5.82	1.23	1.58	16.83	3.35	35.45
Kuwait Main Index	5,782.2	-1.53	-2.99	-3.40	-3.40	3.82	1.03	9.97	4.79	7.40
Kuwait Sector										
Banking	1,715.7	-0.82	-1.67	-3.15	-3.15	4.14	1.72	17.48	3.07	25.91
Telecom	1,035.5	-2.09	-1.01	-2.78	-2.78	-6.30	1.55	10.03	7.95	3.23
Industrials	753.1	-19.53	-22.46	-27.96	-27.96	-17.05	0.99	14.66	3.74	3.19
Financial Services	1,275.2	-2.76	-3.15	-5.79	-5.79	5.19	1.05	12.98	3.81	4.40
Real Estate	1,261.3	-0.72	-3.14	-2.65	-2.65	3.99	0.97	13.55	2.09	2.70
Basic Materials	776.5	-0.65	-1.93	-1.70	-1.70	4.10	1.34	10.91	10.00	0.44
Health Care	316.6	3.17	0.00	-7.87	-7.87	-34.34	1.09	7.70	2.80	
Consumer Staples	789.1	-4.76	-0.56	2.12	2.12	19.81	1.80	21.61	1.49	0.25
Insurance	2,545.1	-0.06	-0.48	-0.87	-0.87	11.00	1.39	13.45	3.33	1.03
Consumer Discretionary	1,625.4	-3.19	-6.89	-7.21	-7.21	1.34				
Energy	1,023.4	0.51	-1.96	-1.88	-1.88	7.83	0.84	9.79	4.95	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	384.2	-3.31	-7.60	-13.61	-13.61	-15.61				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased in early trade on Wednesday as worries about global demand due to weak economic momentum in China and fading hopes for U.S. interest rate cuts in the near-term outweighed supply fears on heightened tensions in the Middle East. Brent futures for June delivery slipped 7 cents, or 0.1%, to \$89.16 a barrel.

Kuwait Market

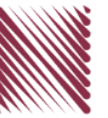
The market closed down by – 2.54% at 6,930.2 value traded 100.2 million KD, Premier market value reached 91.8 million KD down by – 2.75% at 7,569.2.

KSA Market

The market closed down by - 1.64% at 12,500.4.

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	0.859	-0.35	-1.49	-5.06	-5.06	0.89	1.74	13.94	3.88	7.15
KFH	0.715	-0.97	-2.19	-2.09	-2.09	7.35	2.13	20.59	2.57	12.24
ZAIN	0.484	-0.62	1.04	-1.83	-1.83	-4.54	1.68	9.72	7.23	2.10
BOUBYAN BANK	0.614	-0.49	-0.16	-0.65	-0.65	2.33	2.42	32.73	1.30	2.43
AGILITY	0.286	-44.36	-48.56	-56.27	-56.27	-43.81	0.41	8.74	3.50	0.77
Saudi Arabia										
ARAMCO	29.90	-1.32	-1.32	-3.08	-3.08	-9.39	4.71	15.98	5.67	7,235.80
SABIC	82.10	-4.20	-7.13	4.85	4.85	-1.68	1.47	188.78	4.14	246.30
STC	38.60	-1.28	-0.90	-2.53	-2.53	-4.46	2.44	14.52	4.15	193.00
AL-RAJHI BANK	80.40	-2.90	-4.85	-2.31	-2.31	-7.05	3.01	20.35	2.86	321.60
NCB	38.40	-2.91	-6.80	-4.48	-4.48	-0.65	1.30	11.88	4.56	230.40
Abu Dhabi										
ETISALAT.AD	17.60	-2.44	-4.24	-4.14	-4.14	-10.39	3.59	14.85	4.55	153.07
FAB.AD	13.04	-1.21	-2.40	-1.36	-1.36	-6.59	1.15	9.14	5.44	144.07
EMIRATES NBD	17.00	-1.45	-3.13	-2.86	-2.86	-1.73	0.98	5.12	7.06	107.39
DB ISLAMIC DB	5.67	-1.39	-1.56	-2.74	-2.74	-0.87	0.92	6.43	7.94	41.06
EMAR.DU	8.28	-1.66	-2.59	1.35	1.35	4.55	0.94	6.17	6.04	73.19
Qatar										
QNB	14.100	-0.56	-1.61	-0.91	-0.91	-14.70	1.25	8.91	4.61	130.23
INDUSTREIS QAT	12.350	-1.20	-2.76	3.35	3.35	-5.58	1.87	15.83	6.32	74.72
QA ISLAMIC BK	18.480	-0.38	-1.02	0.71	0.71	-14.05	1.49	10.69	3.92	43.67
MASRAF AL RAYA	2.500	-0.87	0.00	7.76	7.76	-5.84	0.95	16.54	4.00	23.25
MESAIEED PETRO	1.933	0.10	0.36	-2.57	-2.57	8.11	1.42	22.43	4.45	24.28
Oman										
BANK MUSCAT	0.265	-0.75	0.00	1.15	1.15	0.38	0.84	10.50	5.85	1.99
OMANTEL	1.054	0.19	-0.09	2.33	2.33	-0.57	1.22	24.16	5.69	0.79
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	0.259	-0.77	-2.63	-0.38	-0.38	-7.50	0.62	9.29	3.28	0.42
OMINVEST	0.410	0.00	2.24	5.13	5.13	-2.38	0.89	8.36	4.88	0.27

* GCC Markets performance at the latest close.

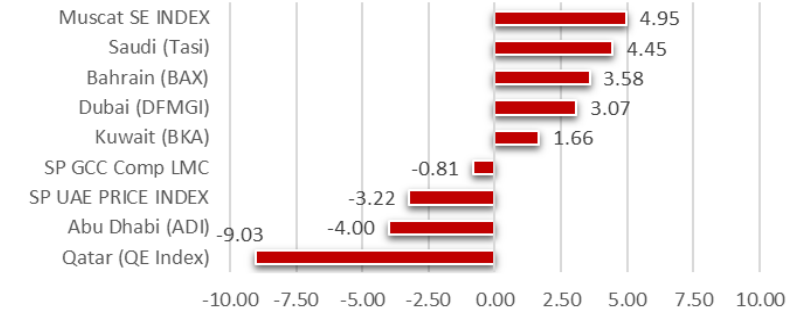
Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
3-April-24	24.59%	15.01%	0.06%	2.5%	5.76%	17.96%	12.82%	6.29%	5.38%
10-April-24	24.61%	14.98%	0.06%	2.49%	5.79%	17.96%	12.85%	6.30%	5.38%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -2.54 %The leading sector bottom performance indices today are Industrials -19.53 % Consumer services -4.76 % Utilities -3.31 % respectively.

KSA

Saudi Armco have negative performance today by -1.32 %, SABIC have negative performance today by -4.2%. STC have negative performance today by -1.28 %, Al Rajhi Bank have negative performance today by -2.9 %



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