

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 16th May 2024





Thursday, May 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)	12,198.4	0.79	-0.70	-1.59	-1.64	1.93	2.32	20.64	3.19	10,637.89
Qatar (QE Index)	9,702.5	0.77	0.72	-0.25	-1.47	-10.42	1.12	11.05	4.89	487.04
Dubai (DFMGI)	4,068.2	-0.43	-2.51	-2.11	-4.19	0.21	1.37	8.12	6.00	592.46
Abu Dhabi (ADI)	9,041.7	0.03	-0.54	-0.28	-2.02	-5.60	2.59	16.13		2,552.52
Bahrain (BAX)	2,009.1	-0.05	-1.04	-0.98	-1.64	1.91	0.87	10.93	4.31	8.18
Muscat SE INDEX	4,792.2	0.35	0.47	0.17	3.38	6.16	0.82	10.17	5.68	6.64
SP GCC Comp LMC	179.1	-0.09	-0.39	-1.42	-3.38	-3.15	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.4	-0.33	-1.77	-2.01	-4.60	-6.81				
Developed Markets										
MSCI World Index	3,472.5	0.11	1.54	5.06	1.01	9.57				
U.S. (S&P 500)	5,303.3	0.12	1.54	5.31	0.93	11.18	4.40	26.06	1.66	46,877.11
U.K. (FTSE 100)	8,420.3	-0.22	-0.16	3.39	5.88	8.88	1.80	15.22	3.62	2,222.93
Japan (topix)	2,745.6	0.30	0.64	0.09	-0.83	16.03	1.44	15.29	2.10	969,444.77
Emerging Markets										
MSCI EM Index	1,099.8	0.11	2.63	5.15	5.42	7.43				
China (SSE Composite)	3,154.0	1.01	-0.02	1.58	3.71	6.02	1.36	12.00		44,025.04
India (Sensex)	74,005.9	0.12	1.85	-0.64	0.48	2.44	4.79	22.20	1.16	146,341.13
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,163.2	-0.17	1.16	1.59	-2.24	5.07	1.47	15.44	3.56	43.23
Kuwait Premier Index	7,827.6	-0.20	1.44	1.77	-2.60	4.69	1.59	16.83	3.38	35.64
Kuwait Main Index	5,962.1	-0.02	-0.18	0.72	-0.39	7.05	1.05	10.61	4.45	7.59
Kuwait Sector										
Banking	1,772.4	-0.26	1.67	2.40	0.05	7.58	1.76	17.59	2.99	26.54
Telecom	1,026.1	0.06	-1.38	-1.68	-3.66	-7.15	1.50	12.23	8.19	3.14
Industrials	758.0	-0.08	0.66	-1.34	-27.49	-16.51	0.81	11.42	5.70	2.57
Financial Services	1,365.7	0.48	1.50	2.43	0.90	12.66	1.09	12.30	2.94	4.65
Real Estate	1,318.8	0.32	0.97	2.57	1.79	8.73	1.01	14.26	2.03	2.80
Basic Materials	840.3	-0.10	1.09	-1.67	6.37	12.65	1.51	14.83	9.30	0.47
Health Care	467.7	-4.10	-1.55	-4.02	36.12	-3.00	1.67	11.74	1.84	
Consumer Staples	859.3	-4.06	1.45	3.17	11.21	30.48	1.86	19.07	2.39	0.26
Insurance	2,465.2	-0.82	-0.63	-0.88	-3.98	7.52	1.34	12.66	3.22	0.99
Consumer Discretionary	1,676.1	-0.38	-0.38	-0.25	-4.31	4.50				
Energy	1,060.3	0.92	0.28	-0.15	1.66	11.72	0.87	10.11	5.48	0.22
Technology	1,767.8	-5.45	-7.25	-7.25	-7.25	205.66	2.18			0.02
Utilities	415.8	0.64	0.00	-4.82	-6.51	-8.67				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil booked its first weekly gain in three weeks, as economic indicators from big consumers China and the United States bolstered hopes for higher demand. China's industrial output rose 6.7% year on year in April as recovery in its manufacturing sector gathered pace, accelerating from 4.5% in March and pointing to possibly stronger demand to come. China also announced major steps to stabilise its crisis-hit property sector. Brent crude oil gained 71 cents, or 0.85%, to \$83.98 a barrel.

Kuwait Market

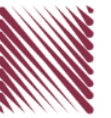
The market closed down by – 0.17% at 7,163.2 value traded 48.6 million KD, Premier market value reached 29.2 million KD down by – 0.2% at 7,827.6.

KSA Market

The market closed up by + 0.79% at 12,198.4.

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	0.875	-0.79	3.18	1.16	-3.29	2.77	1.72	13.71	3.81	7.29
KFH	0.745	0.27	1.22	3.47	2.02	11.85	2.18	21.92	2.46	12.75
ZAIN	0.472	0.00	-1.26	-3.28	-4.26	-6.90	1.64	10.72	7.42	2.04
BOUBYAN BANK	0.592	-1.00	0.00	0.51	1.54	4.59	2.49	31.59	1.27	2.49
AGILITY	0.313	0.97	2.62	-0.95	-13.99	10.52	0.84	9.19	6.39	0.84
Saudi Arabia										
ARAMCO	29.75	1.54	-0.34	-1.16	-3.57	-9.85	4.72	16.41	6.30	7,199.88
SABIC	80.90	1.63	1.13	-4.26	3.32	-3.11	1.45	186.02	4.20	242.71
STC	38.00	0.26	-1.17	0.93	-1.47	-3.42	2.40	14.29	4.21	190.01
AL-RAJHI BANK	80.20	0.12	0.88	0.38	-2.55	-7.28	2.96	19.73	2.87	320.82
NCB	35.60	1.71	-0.84	-5.32	-11.44	-7.89	1.18	10.99	4.92	213.61
Abu Dhabi										
ETISALAT.AD	16.18	-0.49	-4.05	-5.29	-12.31	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.22	-0.49	-1.94	-2.56	-8.02	-12.89	1.12	8.45	5.84	134.32
EMIRATES NBD	16.65	0.30	-0.60	-2.06	-4.86	-3.76	0.97	4.85	7.21	105.15
DB ISLAMIC DB	5.56	-1.24	-1.59	0.00	-4.63	-2.80	0.94	6.19	8.09	40.25
EMAR.DU	7.57	-1.43	-5.73	-7.80	-7.34	-4.42	0.84	5.90	6.61	66.90
Qatar										
QNB	13.980	1.45	0.43	0.79	-1.76	-15.43	1.24	8.83	4.65	129.16
INDUSTREIS QAT	12.060	0.50	0.42	-1.55	0.92	-7.80	2.00	15.09	6.47	72.98
QA ISLAMIC BK	17.550	-0.40	-0.28	-4.10	-4.36	-18.37	1.45	10.03	4.13	41.48
MASRAF AL RAYA	2.430	0.83	2.53	-3.26	4.74	-8.47	0.94	15.84	4.12	22.61
MESAIEED PETRO	1.701	-1.33	-4.97	-11.36	-14.26	-4.87	1.32	21.20	5.06	21.38
Oman										
BANK MUSCAT	0.262	0.38	-0.38	0.00	0.00	-0.76	0.86	10.22	5.92	1.97
OMANTEL	1.052	0.19	0.19	0.67	2.14	-0.75	1.22	24.11	5.70	0.79
BANK DHOFAR	0.155	0.00	-1.90	-3.13	-3.13	-3.13	0.65	15.38	5.00	0.46
NAT BANK OF OMAN	0.275	0.00	0.00	7.00	5.77	-1.79	0.66	9.63	3.09	0.45
OMINVEST	0.375	1.35	0.81	-2.34	2.16	-5.13	0.79	8.15	5.33	0.25

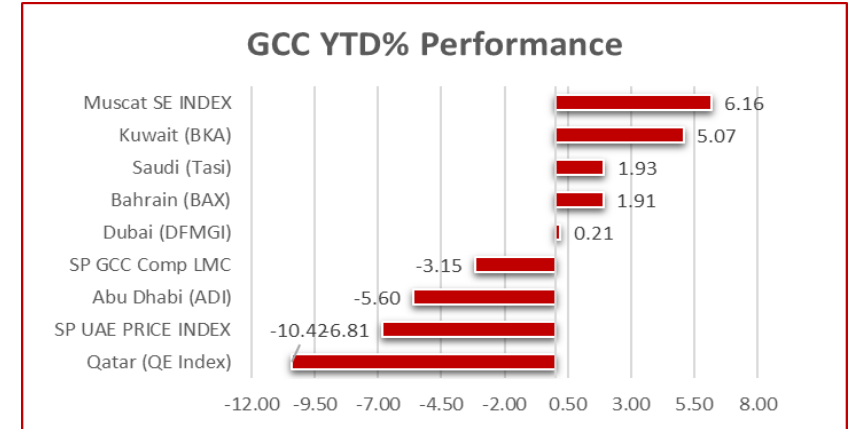
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
08-May-24	24.54%	14.81%	0.06%	2.32%	5.65%	17.88%	12.98%	6.27%	5.45%
15-may-24	24.55%	14.76%	0.06%	2.28%	5.59%	17.82%	12.08%	6.30%	5.44%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.17 %The leading sector bottom performance indices today are Technology -5.45 % Health care -4.1 % Consumer services -4.06 % respectively

KSA

Saudi Armco has a positive performance today by + 1.54 %, SABIC have positive performance today by + 1.6%. STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a positive performance today by + 0.12 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw