



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday ,17th April 2024

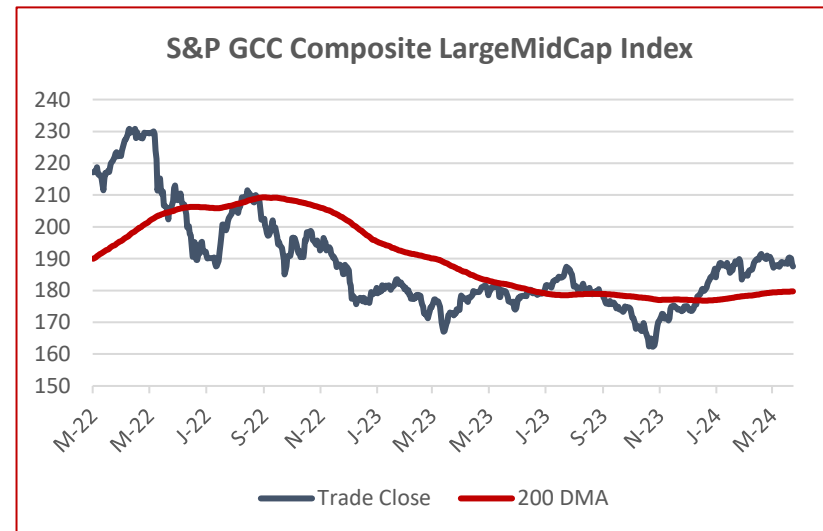




Wednesday, April 17, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,466.0	-0.28	-1.88	0.52	0.52	4.17	2.38	21.27	3.06	10,778.04
Qatar (QE Index)	9,853.3	0.00	-0.71	0.06	0.06	-9.02	1.14	11.27	4.81	496.20
Dubai (DFMGI)	4,172.9	-0.27	-1.68	-1.73	-1.73	2.79	1.35	8.19	5.79	593.95
Abu Dhabi (ADI)	9,165.2	-0.32	-0.78	-0.68	-0.68	-4.31	2.61	17.21	2.08	2,595.65
Bahrain (BAX)	2,027.5	-0.72	-0.64	-0.75	-0.75	2.84	0.88	10.69	4.25	8.26
Muscat SE INDEX	4,722.9	-0.31	0.56	1.88	1.88	4.63	0.80	10.53	5.48	6.57
SP GCC Comp LMC	182.9	-0.31	-3.00	-1.36	-1.36	-1.12	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.9	-0.34	-1.79	-1.27	-1.27	-3.55				
Developed Markets										
MSCI World Index	3,281.1	-0.49	-2.09	-4.56	-4.56	3.53				
U.S. (S&P 500)	5,022.2	-0.58	-1.98	-4.42	-4.42	5.29	4.21	25.11	1.80	44,739.99
U.K. (FTSE 100)	7,848.0	0.35	-1.85	-1.32	-1.32	1.48	1.67	12.93	3.80	2,076.02
Japan (topix)	2,663.2	-1.26	-3.50	-3.81	-3.81	12.54	1.56	14.86	2.04	947,279.80
Emerging Markets										
MSCI EM Index	1,012.5	0.26	-2.81	-2.95	-2.95	-1.10				
China (SSE Composite)	3,071.4	2.14	1.72	0.99	0.99	3.24	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	144,640.89
Kuwait										
Kuwait All Share Index	6,910.1	-0.29	-3.85	-5.69	-5.69	1.36	1.42	14.84	3.64	41.75
Kuwait Premier Index	7,529.6	-0.52	-4.20	-6.31	-6.31	0.70	1.54	16.37	3.45	34.46
Kuwait Main Index	5,832.2	0.86	-2.15	-2.56	-2.56	4.71	1.01	9.84	4.61	7.29
Kuwait Sector										
Banking	1,700.6	-0.88	-2.53	-4.01	-4.01	3.23	1.70	17.34	3.09	25.70
Telecom	1,036.9	0.14	-0.88	-2.65	-2.65	-6.18	1.52	9.82	8.12	3.16
Industrials	765.2	1.61	-21.21	-26.80	-26.80	-15.72	0.79			2.55
Financial Services	1,283.5	0.65	-2.52	-5.17	-5.17	5.88	1.02	12.67	3.48	4.28
Real Estate	1,272.5	0.89	-2.28	-1.78	-1.78	4.92	0.96	13.44	2.09	2.68
Basic Materials	776.3	-0.03	-1.96	-1.73	-1.73	4.07	1.33	10.84	10.07	0.44
Health Care	309.0	-2.40	-2.40	-10.08	-10.08	-35.92	1.13	7.94	2.72	
Consumer Staples	805.2	2.04	1.47	4.20	4.20	22.26	1.71	20.58	1.56	0.24
Insurance	2,551.1	0.24	-0.25	-0.63	-0.63	11.27	1.39	13.50	3.33	1.03
Consumer Discretionary	1,623.7	-0.11	-6.99	-7.30	-7.30	1.23				
Energy	1,026.8	0.34	-1.63	-1.55	-1.55	8.20	0.84	9.84	4.92	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	400.0	4.11	-3.80	-10.06	-10.06	-12.14				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose in early trade on Thursday, slightly paring the previous session's losses after the United States said it would reinstate oil sanctions Venezuela, while the European Union talked of fresh curbs on Iran. Brent futures were up 10 cents, or 0.11%, at \$87.39 a barrel.

Kuwait Market

The market closed down by – 0.29% at 6,910.1 value traded 56.1 million KD, Premier market value reached 50.1 million KD down by – 0.52% at 7,529.6.

KSA Market

The market closed down by - 0.28% at 12,466.0.

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	0.845	-1.63	-3.10	-6.61	-6.61	-0.76	1.71	13.71	3.94	7.03
KFH	0.710	-0.70	-2.87	-2.78	-2.78	6.60	2.11	20.44	2.58	12.14
ZAIN	0.485	0.21	1.25	-1.62	-1.62	-4.34	1.68	9.74	7.22	2.10
BOUBAYAN BANK	0.613	-0.16	-0.33	-0.81	-0.81	2.17	2.42	32.68	1.31	2.43
AGILITY	0.302	5.59	-42.91	-51.46	-51.46	-37.63	0.43	9.22	3.31	0.81
Saudi Arabia										
ARAMCO	29.95	0.17	-1.16	-2.92	-2.92	-9.24	4.72	16.00	5.66	7,247.90
SABIC	81.90	-0.24	-7.35	4.60	4.60	-1.92	1.47	188.32	4.15	245.70
STC	38.25	-0.91	-1.80	-3.41	-3.41	-5.32	2.41	14.38	4.18	191.25
AL-RAJHI BANK	80.50	0.12	-4.73	-2.19	-2.19	-6.94	3.02	20.38	2.86	322.00
NCB	37.70	-1.82	-8.50	-6.22	-6.22	-2.46	1.27	11.66	4.64	226.20
Abu Dhabi										
ETISALAT.AD	17.76	0.91	-3.37	-3.27	-3.27	-9.57	3.62	14.99	4.50	154.44
FAB.AD	12.88	-1.23	-3.59	-2.57	-2.57	-7.74	1.13	9.03	5.51	142.28
EMIRATES NBD	16.85	-0.88	-3.99	-3.71	-3.71	-2.60	0.97	5.07	7.12	106.43
DB ISLAMIC DB	5.70	0.53	-1.04	-2.23	-2.23	-0.35	0.92	6.46	7.89	41.27
EMAR.DU	8.36	0.97	-1.65	2.33	2.33	5.56	0.95	6.23	5.98	73.89
Qatar										
QNB	14.250	1.06	-0.56	0.14	0.14	-13.79	1.26	9.00	4.56	131.58
INDUSTREIS QAT	12.250	-0.81	-3.54	2.51	2.51	-6.35	1.85	15.70	6.37	74.09
QA ISLAMIC BK	18.460	-0.11	-1.12	0.60	0.60	-14.14	1.48	10.67	3.93	43.61
MASRAF AL RAYA	2.530	1.20	1.20	9.05	9.05	-4.71	0.96	16.74	3.95	23.52
MESAIEED PETRO	1.910	-1.19	-0.83	-3.73	-3.73	6.82	1.40	22.17	4.50	23.99
Oman										
BANK MUSCAT	0.264	-0.38	-0.38	0.76	0.76	0.00	0.84	10.46	5.87	1.98
OMANTEL	1.048	-0.57	-0.66	1.75	1.75	-1.13	1.22	24.02	5.73	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	0.00	-2.63	-0.38	-0.38	-7.50	0.62	9.29	3.28	0.42
OMINVEST	0.408	-0.49	1.75	4.62	4.62	-2.86	0.89	8.32	4.90	0.27

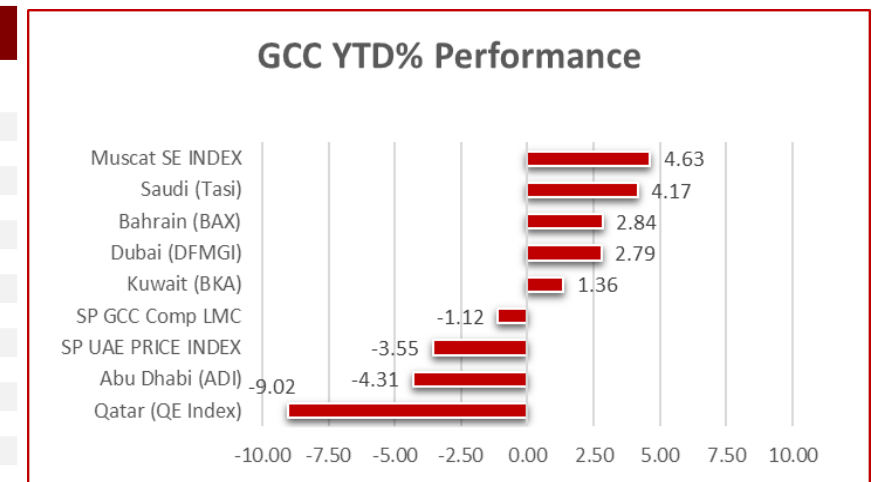
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Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
3-April-24	24.59%	15.01%	0.06%	2.5%	5.76%	17.96%	12.82%	6.29%	5.38%
10-April-24	24.61%	14.98%	0.06%	2.49%	5.79%	17.96%	12.85%	6.30%	5.38%

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 -0.29 %The leading sector bottom performance indices today are Health care -2.4 % Banking -0.88 % Consumer Disc -0.11 % respectively

KSA

Saudi Armco has a positive performance today by + 0.17 %, SABIC have negative performance today by -0.24%, STC have negative performance today by -0.91 %, Al Rajhi Bank has a positive performance today by + 0.12 %



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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