

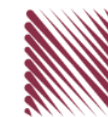


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday ,18th April 2024





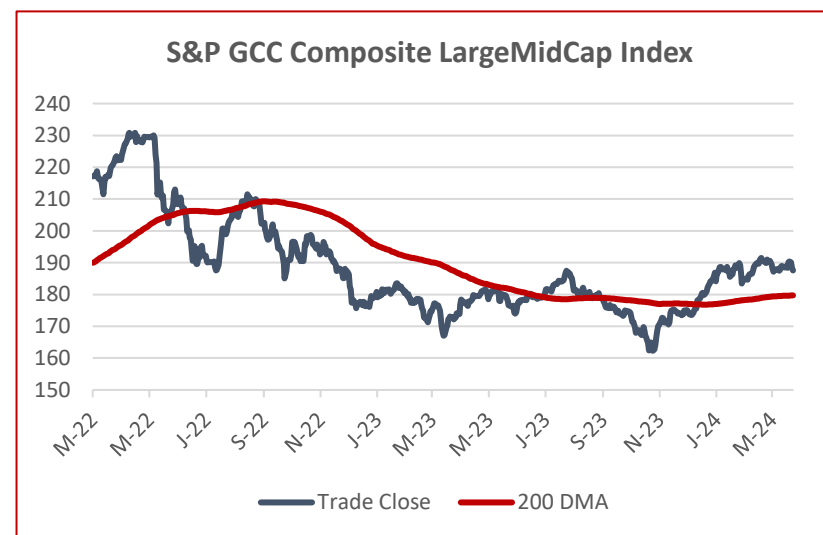
Thursday, April 18, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,502.4	0.29	-1.60	0.81	0.81	4.47	2.38	21.33	3.05	10,784.08
Qatar (QE Index)	9,829.3	-0.24	-0.96	-0.18	-0.18	-9.25	1.14	11.22	4.83	494.59
Dubai (DFMGI)	4,174.6	-0.80	-1.64	-1.69	-1.69	2.83	1.37	8.24	5.80	597.82
Abu Dhabi (ADI)	9,126.1	-0.61	-1.20	-1.11	-1.11	-4.72	2.60	17.13	2.09	2,582.51
Bahrain (BAX)	2,021.4	-0.30	-0.93	-1.04	-1.04	2.53	0.87	10.67	4.25	8.23
Muscat SE INDEX	4,717.1	-0.12	0.43	1.75	1.75	4.50	0.80	10.52	5.49	6.57
SP GCC Comp LMC	183.0	-0.25	-2.95	-1.30	-1.30	-1.07	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	131.9	-1.28	-2.59	-2.07	-2.07	-4.34				

Developed Markets										
MSCI World Index	3,255.6	-0.75	-2.85	-5.30	-5.30	2.73				
U.S. (S&P 500)	4,967.2	-0.88	-3.05	-5.46	-5.46	4.14	4.13	24.68	1.83	43,987.30
U.K. (FTSE 100)	7,895.9	0.24	-1.25	-0.71	-0.71	2.10	1.68	13.00	3.78	2,088.47
Japan (topix)	2,626.3	-1.91	-4.83	-5.14	-5.14	10.98	1.54	14.66	2.07	933,398.30
Emerging Markets										
MSCI EM Index	1,004.2	-1.42	-3.60	-3.74	-3.74	-1.91				
China (SSE Composite)	3,065.3	-0.29	1.52	0.79	0.79	3.04	1.36	12.00		44,025.04
India (Sensex)	73,088.3	0.83	-1.56	-0.76	-0.76	1.17	4.74	23.17	1.14	144,838.89

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,997.1	1.26	-2.64	-4.51	-4.51	2.64	1.43	14.98	3.60	42.16
Kuwait Premier Index	7,643.0	1.51	-2.75	-4.90	-4.90	2.22	1.56	16.53	3.41	34.80
Kuwait Main Index	5,835.5	0.06	-2.09	-2.51	-2.51	4.77	1.02	9.90	4.57	7.35
Kuwait Sector										
Banking	1,725.1	1.44	-1.13	-2.63	-2.63	4.71	1.71	17.43	3.07	25.84
Telecom	1,044.6	0.75	-0.14	-1.92	-1.92	-5.48	1.53	9.91	8.05	3.19
Industrials	785.4	2.64	-19.13	-24.87	-24.87	-13.49	0.83	12.11	4.47	2.66
Financial Services	1,297.3	1.07	-1.47	-4.15	-4.15	7.02	1.03	12.85	3.38	4.35
Real Estate	1,272.8	0.02	-2.25	-1.76	-1.76	4.94	0.97	13.48	2.07	2.71
Basic Materials	780.2	0.50	-1.47	-1.23	-1.23	4.59	1.34	10.89	10.02	0.44
Health Care	314.9	1.92	-0.53	-8.36	-8.36	-34.69	1.12	7.90	2.73	
Consumer Staples	818.9	1.71	3.20	5.98	5.98	24.34	1.78	21.36	1.51	0.25
Insurance	2,553.2	0.08	-0.17	-0.55	-0.55	11.36	1.39	13.58	3.32	1.03
Consumer Discretionary	1,637.6	0.86	-6.19	-6.51	-6.51	2.10				
Energy	1,012.7	-1.37	-2.97	-2.90	-2.90	6.72	0.83	9.76	4.97	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	405.3	1.32	-2.53	-8.88	-8.88	-10.98				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil futures posted a loss for the week as traders see limited risk that Israel's retaliatory strike on Iran will trigger a wider war that disrupts crude supplies. U.S. crude oil and global benchmark Brent have fallen 3% and 3.4%, respectively, since last Friday, erasing gains made when investors bid up prices on fears that Israel and Iran were on the brink of a major war. Brent gained 0.21% to settle \$87.29 a barrel.

Kuwait Market

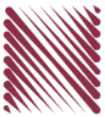
The market closed up by +1.26% at 6,997.1 value traded 83.7 million KD, Premier market value reached 73.2 million KD up by + 1.51% at 7,643.0.

KSA Market

The market closed up by + 0.29% at 12,502.4.

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	0.849	0.47	-2.64	-6.16	-6.16	-0.29	1.72	13.78	3.93	7.09
KFH	0.727	2.39	-0.55	-0.45	-0.45	9.15	2.16	20.93	2.52	12.44
ZAIN	0.490	1.03	2.30	-0.61	-0.61	-3.35	1.70	9.84	7.14	2.12
BOUBAYAN BANK	0.618	0.82	0.49	0.00	0.00	3.00	2.44	32.94	1.29	2.45
AGILITY	0.326	7.95	5.38	-10.41	-10.41	15.11	0.47	9.96	3.07	0.89
Saudi Arabia										
ARAMCO	29.90	-0.17	-1.32	-3.08	-3.08	-9.39	4.71	15.98	5.67	7,235.80
SABIC	80.90	-1.22	-8.48	3.32	3.32	-3.11	1.45	186.02	4.20	242.70
STC	39.25	2.61	0.77	-0.88	-0.88	-2.85	2.48	14.76	4.08	196.25
AL-RAJHI BANK	80.60	0.12	-4.62	-2.07	-2.07	-6.82	3.02	20.40	2.85	322.40
NCB	37.70	0.00	-8.50	-6.22	-6.22	-2.46	1.27	11.66	4.64	226.20
Abu Dhabi										
ETISALAT.AD	18.16	-3.30	-4.46	-4.36	-4.36	-10.59	3.58	14.82	4.56	152.72
FAB.AD	12.86	-0.47	-4.19	-3.18	-3.18	-8.31	1.13	8.97	5.55	141.41
EMIRATES NBD	16.55	-1.19	-5.70	-5.43	-5.43	-4.34	0.95	4.98	7.25	104.54
DB ISLAMIC DB	5.68	-0.87	-1.39	-2.57	-2.57	-0.70	0.92	6.44	7.92	41.13
EMAR.DU	8.29	-1.07	-2.47	1.47	1.47	4.67	0.94	6.17	6.03	73.27
Qatar										
QNB	14.100	-1.05	-1.61	-0.91	-0.91	-14.70	1.25	8.91	4.61	130.23
INDUSTREIS QAT	12.300	0.41	-3.15	2.93	2.93	-5.96	1.86	15.77	6.34	74.42
QA ISLAMIC BK	18.220	-1.30	-2.41	-0.71	-0.71	-15.26	1.50	10.41	3.98	43.05
MASRAF AL RAYA	2.530	0.00	1.20	9.05	9.05	-4.71	0.96	16.74	3.95	23.53
MESAIEED PETRO	1.900	-0.52	-1.35	-4.23	-4.23	6.26	1.40	22.05	4.53	23.87
Oman										
BANK MUSCAT	0.265	0.38	0.00	1.15	1.15	0.38	0.84	10.50	5.85	1.99
OMANTEL	1.044	-0.38	-1.04	1.36	1.36	-1.51	1.21	23.93	5.75	0.78
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	0.255	-1.54	-4.14	-1.92	-1.92	-8.93	0.61	9.15	3.33	0.41
OMINVEST	0.409	0.25	2.00	4.87	4.87	-2.62	0.89	8.34	4.89	0.27

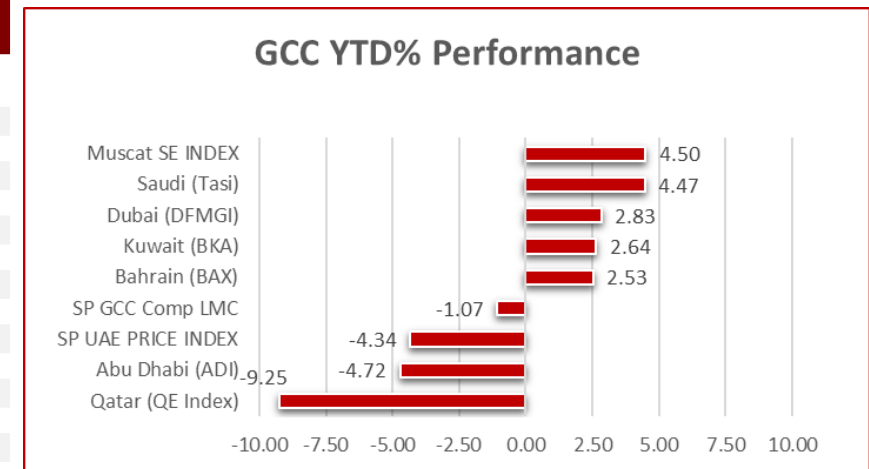
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
10-April-24	24.61%	14.98%	0.06%	2.49%	5.79%	17.96%	12.85%	6.30%	5.38%
17-April-24	24.56%	14.94%	0.06%	2.47%	5.84%	17.96%	12.87%	6.29%	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 up today by + 1.26 %The leading sector best performance indices today are Industrials 2.64 % Health care 1.92 % Consumer services 1.71 % respectively

KSA

Saudi Armco have negative performance today by -0.17 %, SABIC have negative performance today by -1.2%. STC has a positive performance today by + 2.61 %, Al Rajhi Bank has a positive performance today by + 0.12 %



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