



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, February 18, 2024





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,502.0	0.14	0.14	5.98	4.47	4.47	2.39	21.17	2.78	11,201.01
Qatar (QE Index)	10,211.5	0.56	0.56	1.21	-5.72	-5.72	1.21	12.10	4.57	525.93
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)	2,051.7	-0.77	-0.77	-0.75	4.07	4.07	0.82	10.80	3.96	7.52
Muscat SE INDEX	4,636.8	0.15	0.15	1.64	2.72	2.72	0.80	10.39	4.88	6.49
SP GCC Comp LMC	189.6	-0.09	-0.09	3.40	2.54	2.54	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.0	0.00	0.00	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	7,305.3	-0.39	-0.39	0.51	7.16	7.16	1.54	15.56	3.08	48.17
Kuwait Premier Index	7,999.7	-0.49	-0.49	0.51	6.99	6.99	1.69	17.34	2.95	40.02
Kuwait Main Index	6,013.9	0.10	0.10	0.68	7.97	7.97	1.05	9.99	3.74	8.16
Kuwait Sector										
Banking		-0.33	-0.33	0.89	7.56	7.56	1.78	17.64	2.64	30.74
Telecom	1,772.0	-0.47	-0.47	-5.22	2.10	2.10	1.68	10.73	6.38	3.48
Industrials	1,128.3	-1.03	-1.03	2.36	11.06	11.06	1.15	15.74	2.80	3.52
Financial Services	1,008.3	-0.36	-0.36	-0.83	11.12	11.12	1.08	13.38	3.45	4.30
Real Estate	1,347.0	-0.40	-0.40	3.81	4.72	4.72	0.97	14.92	1.80	2.74
Basic Materials	1,270.2	-0.29	-0.29	0.26	2.12	2.12	1.33	11.06	10.23	0.43
Health Care	761.7	-1.39	-1.39	-2.01	-1.95	-1.95	1.74	12.03	1.74	0.24
Consumer Staples	472.8	-1.75	-1.75	-1.89	5.06	5.06	1.61	15.01	1.75	0.21
Insurance	691.9	1.59	1.59	-0.17	2.81	2.81	1.31	7.87	4.02	0.94
Consumer Discretionary	2,357.2	-0.71	-0.71	3.99	2.62	2.62				
Energy	1,646.0	-1.86	-1.86	3.41	11.46	11.46	0.82	10.83	4.67	0.22
Technology	1,057.8	-2.42	-2.42	1.81	254.72	254.72	2.59			0.03
Utilities	2,051.6	0.61	0.61	-2.35	-4.05	-4.05				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Crude oil futures Friday posted a weekly gain as simmering tensions in the Middle East overshadowed stubborn inflation in the U.S. and a murky demand outlook for the year. The West Texas Intermediate contract for March gained \$1.16, or 1.49%, to settle at \$79.19 a barrel. April Brent futures added 61 cents a barrel to settle at \$83.47.

Kuwait Market

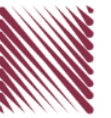
The market closed down by - 0.39 % at 7,305.27 value traded 52.1 million KD, Premier market value reached 36.1 million KD down by - 0.49 % at 7,999.73

KSA Market

The market closed up by + 0.14 % at 12,502.0

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



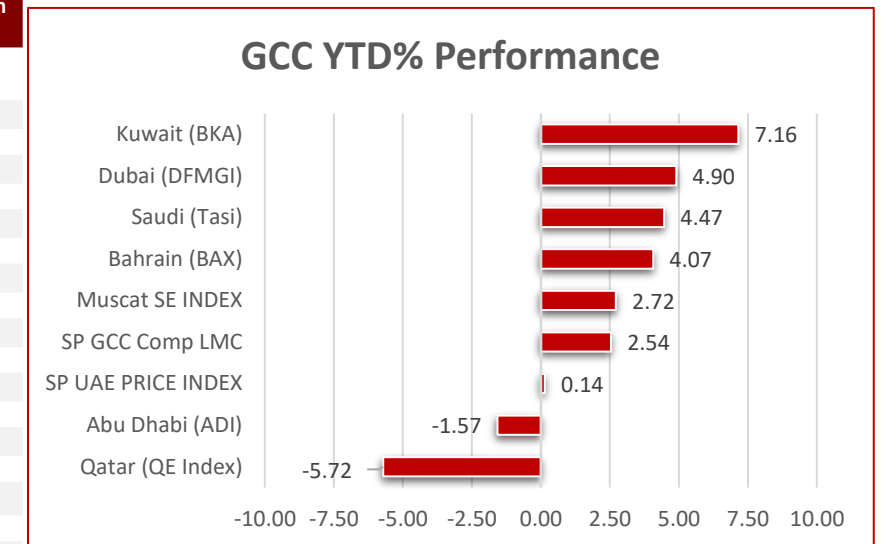
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.974	-0.31	-0.31	-0.61	8.95	8.95	1.79	14.34	3.59	7.71
KFH	0.783	-0.38	-0.38	1.42	7.85	7.85	1.96	20.35	2.15	12.29
ZAIN	0.511	-0.58	-0.58	-2.85	0.79	0.79	1.77	10.22	6.85	2.21
BOUBYAN BANK	0.617	-0.48	-0.48	0.49	2.83	2.83	2.43	32.89	0.92	2.44
AGILITY	0.593	-2.31	-2.31	2.24	16.50	16.50	0.85	17.98	0.00	1.59
Saudi Arabia										
ARAMCO	31.95	0.00	0.00	4.41	-3.18	-3.18	5.00	16.26	4.74	7,732.52
SABIC	79.00	0.00	0.00	1.41	-5.39	-5.39	1.36	77.06	4.30	237.02
STC	41.55	-0.24	-0.24	1.84	2.85	2.85	2.63	15.08	3.85	207.77
AL-RAJHI BANK	89.50	-0.22	-0.22	6.55	3.47	3.47	3.35	22.66	1.98	358.03
NCB	41.45	-1.19	-1.19	2.09	7.24	7.24	1.40	12.82	3.13	248.72
Abu Dhabi										
ETISALAT.AD	19.00	-0.42	2.04	-0.94	-3.26	-3.26	4.04	15.97	4.21	165.06
FAB.AD	14.58	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	47.21
EMAR.DU	8.18	1.61	6.23	10.09	3.28	3.28	0.97	7.55	3.06	72.04
Qatar										
QNB	15.200	2.43	2.43	-2.00	-8.05	-8.05	1.29	9.78	4.28	139.56
INDUSTREIS QAT	12.030	0.08	0.08	0.25	-8.03	-8.03	1.82	15.42	6.48	72.72
QA ISLAMIC BK	20.280	-0.88	-0.88	4.00	-5.67	-5.67	1.63	11.73	3.57	47.83
MASRAF AL RAYA	2.397	-0.42	-0.42	2.00	-9.72	-9.72	0.91	15.86	4.17	22.30
MESAIEED PETRO	1.731	0.06	0.06	3.04	-3.19	-3.19	1.27	20.09	4.97	21.70
Oman										
BANK MUSCAT	0.272	0.74	0.74	1.12	3.03	3.03	0.87	10.78	5.51	2.04
OMANTEL	1.082	0.19	0.19	0.19	2.08	2.08	1.27	29.93	3.00	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	0.265	-1.85	-1.85	-0.38	-5.36	-5.36	0.65	9.57	3.21	0.43
OMINVEST	0.439	0.00	0.00	-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 down today by -0.39 %The leading sector bottom performance indices today are Technology -2.42 % Energy -1.86 % Consumer services -1.75 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC flat performance today 0 %. STC have negative performance today by -0.24 %, Al Rajhi Bank have negative performance today by -0.22 %

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD flat performance today 0 %



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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