

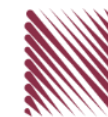


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, February 19, 2024





Market Watch

Monday, February 19, 2024

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,594.57	0.74	0.88	6.76	5.24	5.24	11,232 SAR	2.23	20.11
Qatar (QE Index)	10,299.80	0.87	1.43	2.09	-4.90	-4.90	545 QAR	1.27	13.11
Dubai (DFMGI)	4,272.96	0.33	0.33	2.49	5.25	5.25	618 AED	1.46	15.09
Abu Dhabi (ADI)	9,410.38	-0.18	-0.18	-1.03	-1.75	-1.75	1,435 AED	1.74	43.96
Bahrain (BAX)	2,051.10	-0.03	-0.79	-0.78	4.04	4.04	10 BHD	1.65	9.94
MUSCAT SE INDEX	4,629.68	-0.15	-0.01	1.49	2.56	2.56	5 OMR	0.92	12.01
SP GCC Comp LMC	190.78	0.6	0.50	4.02	3.15	3.15			
SP UAE PRICE INDEX	138.46	0.31	0.31	0.67	0.45	0.45			

Developed Markets

MSCI World Index	3,286.86	0.05	0.05	2.54	3.71	3.71			
U.S. (S&P 500)	5,005.57	0.00	0.00	3.30	4.94	4.94			
U.K. (FTSE 100)	7,728.50	0.22	0.22	1.28	-0.06	-0.06			
Japan (Topix)	2,639.69	0.57	0.57	3.47	11.55	11.55			

Emerging Markets

MSCI EM Index	1,016.38	0.01	0.01	4.16	-0.72	-0.72			
China (SSE Composite)	2,910.54	1.56	1.56	4.37	-2.16	-2.16			
India (Sensex)	72,708.16	0.39	0.39	1.33	0.65	0.65			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,353.37	0.66	0.27	1.17	7.86	7.86	44.90 KWD	1.79	18.19
Kuwait Premier Index	8,060.79	0.76	0.27	1.27	7.81	7.81	34.00 KWD	1.82	18.90
Kuwait Main Index	6,024.35	0.17	0.28	0.86	8.16	8.16	10.90 KWD	1.70	16.01
Kuwait Sector									
Banking	1,783.26	0.63	0.30	1.53	8.24	8.24	27.42 KWD	1.17	19.90
Telecom	1,133.51	0.46	-0.01	-4.79	2.57	2.57	3.46 KWD	1.43	9.51
Industrials	1,017.90	0.95	-0.09	3.33	12.12	12.12	3.49 KWD	0.92	12.53
Financial services	1,360.10	0.97	0.61	0.13	12.20	12.20	3.90 KWD	0.86	29.63
Real estate	1,274.93	0.38	-0.02	4.20	5.11	5.11	2.76 KWD	0.66	19.26
Basic materials	773.09	1.49	1.19	1.75	3.64	3.64	0.72 KWD	2.34	10.45
Health care	472.77	0.00	-1.39	-2.01	-1.95	-1.95	0.23 KWD	0.93	12.19
Consumer services	697.04	0.74	-1.02	-1.16	5.84	5.84	0.82 KWD	1.13	15.63
Insurance	2,403.05	1.94	3.56	1.77	4.81	4.81	0.98 KWD	1.12	6.83
Consumer Disc	1,634.46	-0.70	-1.41	3.26	1.90	1.90	0.21 KWD	1.28	105.64
Energy	1,048.51	-0.88	-2.72	2.50	10.48	10.48	0.22 KWD	0.84	9.56
Technology	2,058.82	0.35	-2.08	2.17	255.98	255.98	0.03 KWD	2.40	0.00
Utilities	444.74	1.81	2.43	-0.59	-2.31	-2.31	0.19 KWD	1.41	13.09

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were little changed in early Asian trading on Tuesday, hovering close to three-week highs on heightened Middle East tensions and recovering China demand. Brent futures ticked down 8 cents to \$83.48 a barrel .

Kuwait Market

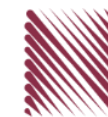
The market closed up by + 0.66 % at 7,353.37 value traded 60.1 million KD, Premier market value reached 44.2 million KD down by + 0.76 % at 8,060.79

KSA Market

The market closed up by + 0.74 % at 12,594.57

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.979	0.51	0.20	-0.10	9.51	9.51	7.76 KWD	1.80	27.00
KFH	0.788	0.64	0.25	2.07	8.54	8.54	12.37 KWD	1.97	32.00
Zain	0.514	0.59	0.00	-2.28	1.38	1.38	2.22 KWD	1.78	10.28
BOUBYAN BANK	0.630	2.11	1.61	2.61	5.00	5.00	2.50 KWD	2.48	34.00
Agility	0.605	2.02	-0.33	4.31	18.86	18.86	1.62 KWD	0.87	18.34
Saudi Arabia									
ARAMCO	31.95	0.00	0.00	4.41	-3.18	-3.18	7,731.90 SAR	5.00	16.64
SABIC	79.20	0.25	0.25	1.67	-5.15	-5.15	237.60 SAR	1.37	35.00
STC	41.75	0.48	0.24	2.33	3.34	3.34	208.75 SAR	2.64	15.04
AL-RAJHI BANK	90.00	0.56	0.33	7.14	4.05	4.05	360.00 SAR	3.37	22.66
NCB	41.45	0.00	-1.19	2.09	7.24	7.24	248.70 SAR	1.40	12.82
United Arab Emirates									
ETISALAT.AD	19.06	0.32	0.32	-0.63	-2.95	-2.95	206.60 AED	5.10	21.10
FAB.AD	14.44	-0.96	-0.96	-1.37	3.44	3.44	159.54 AED	1.27	10.12
EMIRATES NBD	18.50	1.65	1.65	4.52	6.94	6.94	116.87 AED	1.06	5.57
DB ISLAMIC BK	6.47	-0.92	-0.92	2.37	13.11	13.11	46.85 AED	1.05	7.34
EMAAR PROPERT	8.20	0.24	0.24	10.36	3.54	3.54	72.48 AED	0.97	6.08
Qatar									
QNB	15.07	-0.86	1.55	-2.84	-8.83	-8.83	139.19 QAR	1.28	9.69
INDUSTRIES QAT	12.10	0.58	0.67	0.83	-7.49	-7.49	73.21 QAR	1.83	15.51
QA ISLAMIC BK	20.75	2.32	1.42	6.41	-3.49	-3.49	49.03 QAR	1.67	12.00
MASRAF AL RAYA	2.49	3.84	3.41	5.91	-6.25	-6.25	23.15 QAR	0.94	16.46
MESAIEED PETRO	1.79	3.41	3.47	6.55	0.11	0.11	22.49 QAR	1.32	20.77
OMAN									
BANK MUSCAT	0.270	-0.74	0.00	0.37	2.27	2.27	2.03 OMR	0.86	8.33
OMANTEL	1.080	21.62	0.00	0.00	1.89	1.89	0.81 OMR	1.27	7.69
BANK DHOFAR	0.150	0.00	0.00	0.00	-6.25	-6.25	0.45 QAR	0.61	14.93
NAT BANK OF OMAN	0.265	0.00	-1.85	-0.38	-5.36	-5.36	0.43 QAR	0.65	12.71
OMINVEST	0.439	0.00	0.00	-2.44	4.52	4.52	0.29 QAR	0.97	6.85

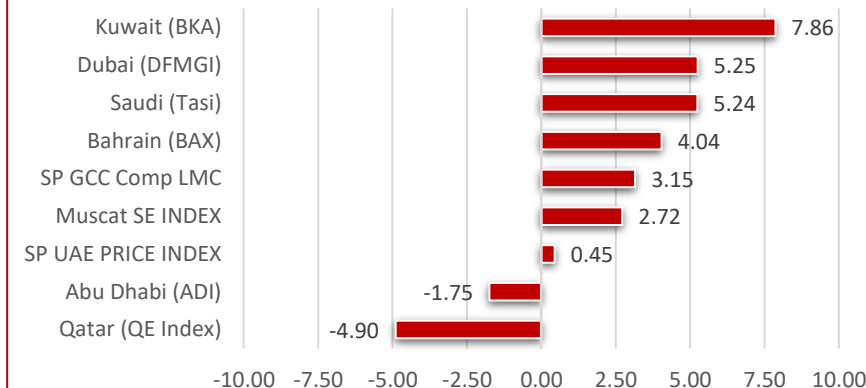
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-February-24	24.38%	14.85%	0.06%	2.64%	0.19%	5.44%	17.89%	13.07%	6.25%	5.19%
14-February-24	24.44%	14.80%	0.06%	2.69%	0.19%	5.46%	17.90%	13.20%	6.26%	5.21%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.66 %The leading sector best performance indices today are Insurance 1.94 % Utilities 1.81 % Basic materials 1.49 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.25%. STC has a positive performance today by + 0.48 %, Al Rajhi Bank has a positive performance today by + 0.56 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.32 %, FAB.AD have negative performance today by -0.96 %



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