



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

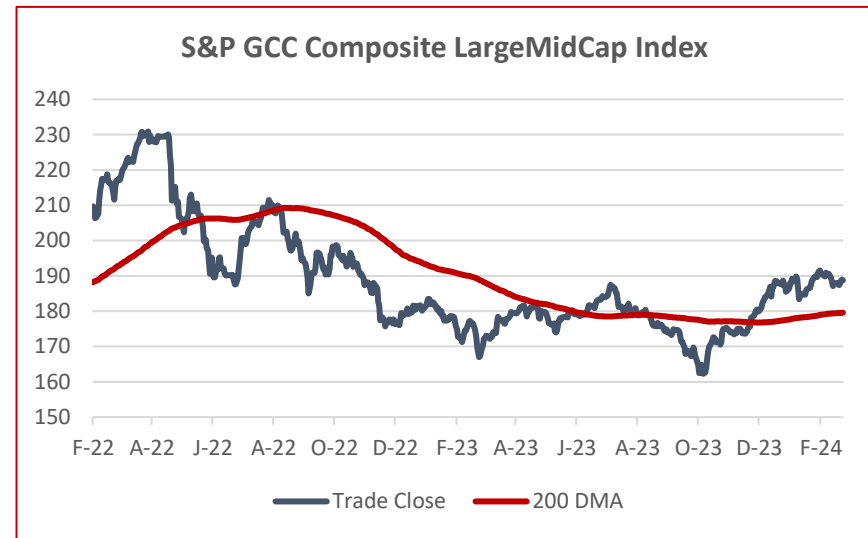
Tuesday , March 19, 2024





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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)	12,804.0	0.25	0.59	1.37	6.99	6.99	2.47	22.27	2.92	11,179.72
Qatar (QE Index)	10,227.6	-0.32	-0.28	-2.36	-5.57	-5.57	1.21	11.77	4.61	524.30
Dubai (DFMGI)	4,272.8	-0.06	0.24	-0.84	5.25	5.25	1.38	8.38	5.69	609.49
Abu Dhabi (ADI)	9,259.1	0.13	0.41	0.05	-3.33	-3.33	2.50	17.07	2.11	2,610.21
Bahrain (BAX)	2,035.6	0.02	-0.55	1.51	3.25	3.25	0.81	10.66	4.64	7.46
Muscat SE INDEX	4,830.9	1.27	0.95	6.06	7.02	7.02	0.81	10.72	5.38	6.72
SP GCC Comp LMC	188.9	0.09	0.07	-0.81	2.14	2.14	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.3	0.13	0.59	-0.14	-1.83	-1.83				
Developed Markets										
MSCI World Index	3,393.4	0.38	0.90	1.68	7.07	7.07				
U.S. (S&P 500)	5,178.5	0.56	1.20	1.61	8.57	8.57	4.33	25.78	1.75	45,860.32
U.K. (FTSE 100)	7,738.3	0.20	0.14	1.42	0.07	0.07	1.65	12.70	3.84	2,046.57
Japan (topix)	2,751.0	1.06	3.00	2.81	16.25	16.25	1.62	15.36	1.98	985,209.37
Emerging Markets										
MSCI EM Index	1,027.8	-0.99	-0.67	0.67	0.39	0.39				
China (SSE Composite)	3,079.7	0.55	0.82	2.14	3.52	3.52	1.36	12.00		44,025.04
India (Sensex)	72,012.1	-1.01	-0.87	-0.67	-0.32	-0.32	4.66	22.97	1.14	143,001.04
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,375.3	-0.44	-0.91	-0.88	8.19	8.19	1.51	12.33	3.34	44.26
Kuwait Premier Index	8,074.1	-0.53	-0.92	-1.04	7.99	7.99	1.66	17.15	3.14	36.79
Kuwait Main Index	6,082.7	0.02	-0.86	-0.05	9.21	9.21	1.05	4.86	4.31	7.47
Kuwait Sector										
Banking	1,786.5	-0.62	-0.90	-1.31	8.44	8.44	1.77	17.60	2.88	26.76
Telecom	1,114.2	-0.27	-0.84	-0.27	0.82	0.82	1.63	10.57	7.54	3.41
Industrials	1,008.5	-0.55	-1.47	-0.66	11.08	11.08	1.13	3.45	2.80	3.44
Financial Services	1,372.1	0.12	-1.22	-1.09	13.19	13.19	1.10	13.40	3.37	4.37
Real Estate	1,282.4	-0.92	-1.88	0.22	5.73	5.73	0.97	14.89	1.84	2.76
Basic Materials	778.1	0.00	-0.44	-0.26	4.31	4.31	1.36	11.06	10.05	0.44
Health Care	478.7	0.00	0.00	-1.54	-0.71	-0.71	1.74	11.98	1.74	0.24
Consumer Staples	719.0	0.09	0.52	0.52	9.17	9.17	1.56	18.75	1.71	0.22
Insurance	2,560.1	0.36	0.10	1.56	11.66	11.66	1.40	9.83	3.69	1.03
Consumer Discretionary	1,705.6	1.24	2.02	2.33	6.34	6.34				
Energy	1,034.7	-0.08	0.11	0.05	9.03	9.03	0.79	10.42	4.87	0.22
Technology	1,942.4	0.00	-0.37	-4.30	235.85	235.85	2.40			0.03
Utilities	444.7	0.59	-0.59	-0.59	-2.31	-2.31				



What Move the GCC markets

Oil Prices

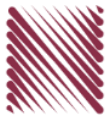
Oil prices edged down early on Tuesday after gaining in the previous trading session, due in part to the prospect of rising supply from Russia as well as the possibility of slower-than-expected downstream demand in sectors such as jet fuel. The Brent crude oil futures contract for May delivery slipped 16 cents to \$86.73 a barrel.

Kuwait Market

The market closed down by – 0.44 % at 7,375.3 value traded 37.4 million KD, Premier market value reached 30.6 million KD down by – 0.53% at 8,074.1.

KSA Market

The market closed up by + 0.25 % at 12,804.0.

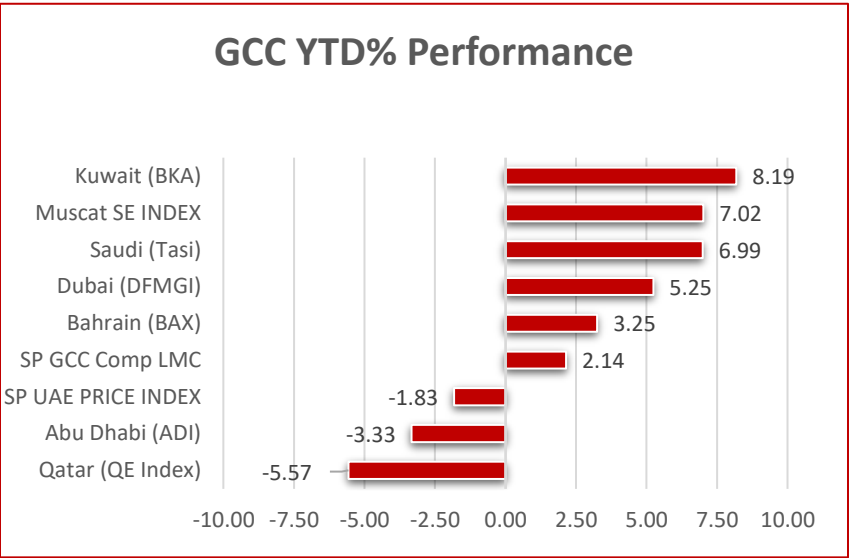


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.966	0.31	-0.10	-1.43	8.05	8.05	1.77	14.22	3.62	7.67
KFH	0.803	-0.99	-0.99	-0.86	10.61	10.61	2.01	20.87	2.49	12.62
ZAIN	0.501	-0.40	-1.38	-0.40	-1.18	-1.18	1.74	10.06	6.99	2.17
BOUBYAN BANK	0.616	-1.12	-1.12	-4.20	2.67	2.67	2.43	32.84	1.30	2.44
AGILITY	0.594	-0.67	-1.82	-1.16	16.70	16.70	0.85	18.01	0.00	1.59
Saudi Arabia										
ARAMCO	31.40	0.96	0.48	-0.95	-4.85	-4.85	4.95	16.78	5.40	7,598.80
SABIC	76.80	-0.13	-0.78	-2.54	-8.02	-8.02	1.38	176.60	4.43	230.40
STC	39.70	0.13	-0.13	-6.48	-1.73	-1.73	2.51	14.93	4.03	198.50
AL-RAJHI BANK	85.10	0.00	-1.28	-4.38	-1.62	-1.62	3.19	21.54	2.70	340.40
NCB	39.75	0.89	2.32	-6.14	2.85	2.85	1.34	12.30	3.26	238.50
Abu Dhabi										
ETISALAT.AD	18.24	-0.33	-0.44	0.77	-7.13	-7.13	3.72	15.39	4.39	159.15
FAB.AD	13.32	0.76	1.83	-2.35	-4.58	-4.58	1.17	9.34	5.33	147.82
EMIRATES NBD	17.60	0.00	-1.12	-3.83	1.73	1.73	1.01	5.30	6.82	111.49
DB ISLAMIC DB	5.77	-0.35	0.17	-10.40	0.87	0.87	0.94	6.54	7.80	42.14
EMAR.DU	8.42	0.24	2.43	3.69	6.31	6.31	0.96	6.27	5.94	74.42
Qatar										
QNB	14.700	0.00	-0.68	-3.48	-11.07	-11.07	1.24	9.45	4.42	136.14
INDUSTREIS QAT	12.070	-0.25	1.26	-6.43	-7.72	-7.72	1.83	15.47	6.46	73.02
QA ISLAMIC BK	19.510	-0.46	-0.56	-3.18	-9.26	-9.26	1.57	11.28	3.72	46.17
MASRAF AL RAYA	2.510	-0.40	-2.33	-0.79	-5.46	-5.46	0.95	16.61	3.98	23.34
MESAIEED PETRO	1.917	-0.21	-0.62	1.43	7.21	7.21	1.41	22.25	4.49	24.08
Oman										
BANK MUSCAT	0.274	1.11	1.11	4.58	3.79	3.79	0.87	10.86	5.66	2.06
OMANTEL	1.095	0.92	0.92	1.58	3.30	3.30	1.28	30.29	5.48	0.82
BANK DHOFAR	0.158	0.00	0.00	8.97	-1.25	-1.25	0.65	16.92	4.91	0.47
NAT BANK OF OMAN	0.280	5.66	1.82	11.11	0.00	0.00	0.67	10.05	3.04	0.46
OMINVEST	0.389	0.00	-0.26	-0.26	-7.38	-7.38	0.86	10.65	3.86	0.26

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
6-March-24	24.55%	15.02%	0.06%	2.62%	5.53%	17.86%	12.76%	6.32%	5.28%
13-March-24	24.54%	15.08%	0.06%	2.61%	5.58%	17.90%	12.77%	6.32%	5.32%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.44 %The leading sector bottom performance indices today are Real estate -0.92 % Banking -0.62 % Industrials -0.55 % respectively

KSA

Saudi Armco has a positive performance today by + 0.96 %, SABIC has a negative performance today by -0.13 %. STC has a positive performance today by + 0.13 %, Al Rajhi Bank has a flat performance today.

U.A.E

ETISALAT .AD have negative performance today by -0.33 %, FAB.AD has a positive performance today by + 0.76 %



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