



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 1, 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)	11,914.29	1.00	-2.03	1.00	-0.44	-0.44	2.35	20.18	2.91	10,798.24
Qatar (QE Index)	10,049.36	-0.39	-2.88	-0.39	-7.21	-7.21	1.19	11.65	4.99	519.86
Dubai (DFMGI)	4,228.74	0.20	1.57	1.43	4.16	4.16	1.45	9.10	5.15	608.00
Abu Dhabi (ADI)	9,456.25	-0.14	-1.16	-0.55	-1.27	-1.27	2.90	17.27	2.04	2,669.58
Bahrain (BAX)	2,067.11	0.00	2.65	0.00	4.85	4.85	0.84	10.60	5.50	7.58
Muscat SE INDEX	4,562.92	0.02	-0.97	0.02	1.08	1.08	0.80	10.50	4.92	6.39
SP GCC Comp LMC	184.52	-0.02	-2.09	0.60	-0.23	-0.23	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.03	-0.11	-1.42	-0.37	-0.59	-0.59				
Developed Markets										
MSCI World Index	3,247.64	0.65	0.98	1.32	2.48	2.48				
U.S. (S&P 500)	4,958.61	1.07	1.38	2.33	3.96	3.96	4.36	25.02	1.84	43,900.43
U.K. (FTSE 100)	7,615.54	-0.09	-0.26	-0.20	-1.52	-1.52	1.60	10.69	3.91	2,018.33
Japan (topix)	2,539.68	0.22	1.68	-0.45	7.32	7.32	1.51	14.74	2.13	911,371.07
Emerging Markets										
MSCI EM Index	988.21	0.62	0.32	1.27	-3.47	-3.47				
China (SSE Composite)	2,730.15	-1.46	-6.19	-2.09	-8.23	-8.23	1.36	12.00		44,025.04
India (Sensex)	72,085.63	0.61	1.96	0.46	-0.21	-0.21	4.62	22.90	1.14	143,046.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,238.31	-0.41	-1.43	-0.41	6.18	6.18	1.52	15.08	3.12	46.87
Kuwait Premier Index	7,918.19	-0.52	-1.79	-0.52	5.90	5.90	1.68	16.72	2.97	37.47
Kuwait Main Index	5,971.78	-0.02	-0.03	-0.02	7.22	7.22	1.09	10.51	3.75	9.40
Kuwait Sector										
Banking	1,750.63	-0.32	-1.85	-0.32	6.26	6.26	1.76	17.02	2.64	29.61
Telecom	1,181.74	-0.74	0.49	-0.74	6.93	6.93	1.79	10.67	5.98	3.63
Industrials	977.58	-0.76	-0.82	-0.76	7.67	7.67	1.09	15.02	2.91	3.38
Financial Services	1,349.10	-0.68	-0.24	-0.68	11.29	11.29	1.08	13.29	3.44	4.29
Real Estate	1,223.07	-0.03	-1.22	-0.03	0.84	0.84	0.95	14.43	2.00	2.63
Basic Materials	757.24	-0.34	-1.72	-0.34	1.52	1.52	1.32	10.97	10.32	0.43
Health Care	482.45	0.00	0.00	0.00	0.06	0.06	1.75	12.11	1.72	0.24
Consumer Staples	707.60	0.34	2.02	0.34	7.44	7.44	1.62	15.16	1.74	0.22
Insurance	2,366.38	0.22	-1.16	0.22	3.21	3.21	1.33	8.07	3.94	0.95
Consumer Discretionary	1,575.83	-0.44	-4.45	-0.44	-1.75	-1.75				
Energy	992.71	-2.96	-5.25	-2.96	4.60	4.60	0.78	10.60	5.11	0.21
Technology	2,022.45	0.36	3.73	0.36	249.69	249.69	2.50			0.03
Utilities	439.47	-1.77	-3.47	-1.77	-3.47	-3.47				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell by about 2% and posted weekly losses after U.S. jobs data shrank the odds of imminent interest rate cuts in the world's largest economy, which could dampen crude demand, Brent crude futures settled at \$77.33 a barrel.

Kuwait Market

The market closed down by – 0.41 % at 7,238.31 value traded 77.0 million KD, Premier market value reached 65.8 million KD down by – 0.52 % at 7,918.19

KSA Market

The market closed up by + 1.0 % at 11,914.29



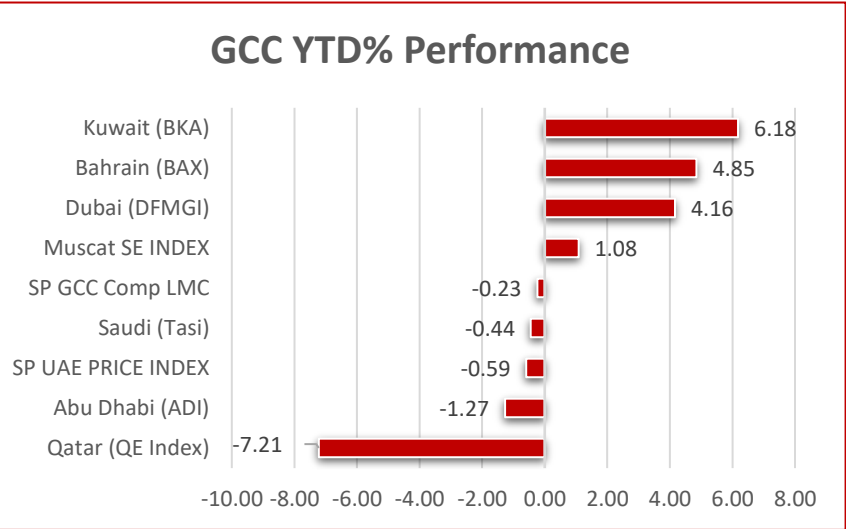
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.973	-0.71	-1.42	-0.71	8.84	8.84	1.78	14.32	3.47	7.72
KFH	0.770	-0.26	-2.04	-0.26	6.06	6.06	1.97	19.02	2.18	11.37
ZAIN	0.516	-1.90	-2.64	-1.90	1.78	1.78	1.79	10.32	6.78	2.23
BOUBYAN BANK	0.619	0.81	-3.13	0.81	3.17	3.17	2.44	33.00	0.91	2.45
AGILITY	0.576	-0.69	1.05	-0.69	13.16	13.16	0.83	17.47	0.00	1.54
Saudi Arabia										
ARAMCO	31.00	1.31	-1.74	1.31	-6.06	-6.06	4.85	15.78	4.89	7,502.00
SABIC	78.40	0.64	-0.51	0.64	-6.11	-6.11	1.35	76.48	4.34	235.20
STC	41.75	2.33	-2.11	2.33	3.34	3.34	2.64	15.15	3.83	208.75
AL-RAJHI BANK	86.00	2.38	-2.82	2.38	-0.58	-0.58	3.36	20.41	2.06	344.00
NCB	41.15	1.35	-4.41	1.35	6.47	6.47	1.45	12.84	3.15	246.90
Abu Dhabi										
ETISALAT.AD	19.28	-1.56	-3.16	-1.04	-3.36	-3.36	4.03	15.95	4.21	165.06
FAB.AD	14.10	0.28	-5.35	-3.42	1.29	1.29	1.25	9.91	5.02	156.21
EMIRATES NBD	17.80	1.40	-0.28	1.98	4.34	4.34	1.04	5.43	6.65	114.01
DB ISLAMIC DB	6.39	-0.16	2.08	0.95	11.54	11.54	1.03	7.23	7.05	46.20
EMAR.DU	7.54	-0.66	0.27	0.81	-5.43	-5.43	0.89	6.91	3.34	66.20
Qatar										
QNB	15.490	-0.13	-3.49	-0.13	-6.29	-6.29	1.31	9.96	4.20	143.07
INDUSTREIS QAT	12.070	0.58	-1.07	0.58	-7.72	-7.72	1.89	15.65	9.11	73.02
QA ISLAMIC BK	19.300	-1.03	-3.26	-1.03	-10.23	-10.23	1.55	11.16	3.76	45.60
MASRAF AL RAYA	2.300	-2.13	-6.08	-2.13	-13.37	-13.37	0.87	15.22	4.35	21.39
MESAIEED PETRO	1.661	-1.13	-2.87	-1.13	-7.10	-7.10	1.24	18.22	6.62	20.87
Oman										
BANK MUSCAT	0.27	0.37	0.75	0.37	2.27	2.27	0.86	10.70	5.56	2.03
OMANTEL	1.081	0.09	0.19	0.09	1.98	1.98	1.27	29.90	3.01	0.81
BANK DHOFAR	0.150	0.00	-6.25	0.00	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.260	-2.26	-4.06	-2.26	-7.14	-7.14	0.63	9.39	3.27	0.42
OMINVEST	0.440	-2.22	-5.38	-2.22	4.76	4.76	0.97	12.04	3.41	0.29

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
24-January-24	24.35%	14.76%	0.06%	2.28%	0.19%	5.60%	17.69%	13.07%	6.20%	5.20%
31-January-24	24.37%	14.87%	0.06%	2.52%	0.19%	5.56%	17.79%	13.09%	6.24%	5.19%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.41 %The leading sector bottom performance indices today are Energy -2.96 % Utilities -1.77 % Industrials -0.76 % respectively

KSA

Saudi Armco has a positive performance today by + 1.31 %, SABIC has a positive performance today by + 0.64 % . STC has a positive performance today by + 2.33 %, Al Rajhi Bank have positive performance today by + 2.38 %

U.A.E

ETISALAT .AD has a negative performance today by -1.56 %, FAB.AD has a positive performance today by + 0.28 %



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