

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 20th May 2024



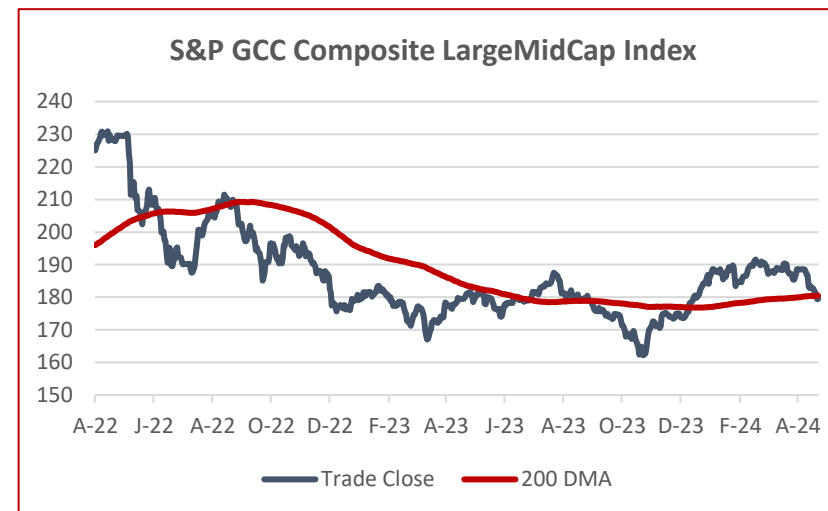


Monday, May 20, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,125.4	-0.60	-0.60	-2.17	-2.23	1.32	2.30	20.50	3.21	10,645.95
Qatar (QE Index)	9,677.2	-0.32	-0.26	-0.51	-1.73	-10.65	1.12	11.01	4.91	484.17
Dubai (DFMGI)	4,067.2	-0.03	-0.03	-2.13	-4.22	0.18	1.37	8.14	5.98	592.31
Abu Dhabi (ADI)	9,037.8	-0.04	-0.04	-0.33	-2.06	-5.64	2.58	16.12	2.12	2,551.02
Bahrain (BAX)	2,018.0	0.11	0.44	-0.54	-1.21	2.36	0.87	11.00	4.29	8.22
Muscat SE INDEX	4,781.8	0.00	-0.22	-0.05	3.15	5.93	0.82	10.27	5.70	6.62
SP GCC Comp LMC	178.2	-0.45	-0.51	-1.92	-3.87	-3.64	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.0	0.45	0.45	-1.57	-4.17	-6.39				
Developed Markets										
MSCI World Index	3,477.1	0.13	0.13	5.20	1.14	9.72				
U.S. (S&P 500)	5,308.1	0.09	0.09	5.41	1.02	11.29	4.40	26.06	1.66	46,877.11
U.K. (FTSE 100)	8,424.2	0.05	0.05	3.44	5.93	8.93	1.80	15.24	3.62	2,224.08
Japan (topix)	2,768.0	0.82	0.82	0.91	-0.02	16.97	1.45	15.38	2.09	976,188.42
Emerging Markets										
MSCI EM Index	1,101.9	0.19	0.19	5.35	5.63	7.64				
China (SSE Composite)	3,171.1	0.54	0.54	2.14	4.27	6.60	1.36	12.00		44,025.04
India (Sensex)	74,005.9	0.12	1.85	-0.64	0.48	2.44	4.80	22.22	1.16	146,573.70

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,152.2	-0.36	-0.15	1.43	-2.39	4.91	1.47	15.46	3.55	43.35
Kuwait Premier Index	7,811.3	-0.42	-0.21	1.56	-2.80	4.47	1.60	16.87	3.38	35.72
Kuwait Main Index	5,969.0	-0.05	0.12	0.83	-0.28	7.17	1.04	10.58	4.44	7.63
Kuwait Sector										
Banking	1,767.5	-0.40	-0.27	2.12	-0.23	7.29	1.76	17.62	2.99	26.58
Telecom	1,032.5	-0.56	0.62	-1.07	-3.06	-6.57	1.52	12.38	8.10	3.17
Industrials	751.5	-1.15	-0.85	-2.19	-28.11	-17.23	0.80	11.44	5.68	2.58
Financial Services	1,369.0	-0.19	0.24	2.67	1.14	12.93	1.09	12.38	2.93	4.70
Real Estate	1,313.7	-0.03	-0.39	2.17	1.39	8.31	1.01	14.28	2.04	2.79
Basic Materials	834.6	-0.17	-0.68	-2.34	5.65	11.88	1.50	14.75	9.35	0.47
Health Care	462.4	-1.14	-1.14	-5.11	34.57	-4.10	1.67	11.74	1.84	
Consumer Staples	895.9	4.10	4.27	7.57	15.95	36.04	1.87	19.10	2.39	0.26
Insurance	2,488.0	0.87	0.92	0.04	-3.09	8.51	1.34	12.15	3.21	0.99
Consumer Discretionary	1,669.1	-0.82	-0.42	-0.66	-4.71	4.06				
Energy	1,063.0	0.07	0.26	0.11	1.92	12.01	0.87	9.95	5.48	0.22
Technology	1,709.6	3.07	-3.29	-10.31	-10.31	195.60	2.05			0.02
Utilities	415.8	0.00	0.00	-4.82	-6.51	-8.67				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Tuesday, with investors anticipating higher-for-longer U.S. inflation and interest rates will depress consumer and industrial demand. Brent crude futures LCOcI declined 12 cents, or 0.1%, to \$83.34 a barrel.

Kuwait Market

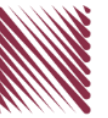
The market closed down by - 0.36% at 7,152.2 value traded 57.4 million KD, Premier market value reached 40.2 million KD down by - 0.42% at 7,811.3.

KSA Market

The market closed down by -0.60 at 12,125.4.

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	0.870	-0.57	-0.57	0.58	-3.84	2.18	1.71	13.63	3.83	7.24
KFH	0.744	-0.27	-0.13	3.33	1.88	11.70	2.18	21.90	2.47	12.73
ZAIN	0.478	-0.42	1.27	-2.05	-3.04	-5.72	1.66	10.86	7.32	2.07
BOUBYAN BANK	0.583	-1.19	-1.52	-1.02	0.00	3.00	2.45	31.11	1.29	2.45
AGILITY	0.308	-1.60	-1.60	-2.53	-15.36	8.75	0.83	9.04	6.49	0.82
Saudi Arabia										
ARAMCO	29.90	0.00	0.50	-0.66	-3.08	-9.39	4.75	16.49	6.27	7,236.19
SABIC	78.10	-2.25	-3.46	-7.57	-0.26	-6.47	1.40	179.59	4.35	234.31
STC	38.05	-0.78	0.13	1.06	-1.34	-3.30	2.36	14.12	4.20	190.26
AL-RAJHI BANK	79.80	-0.25	-0.50	-0.13	-3.04	-7.75	2.95	19.63	2.88	319.22
NCB	34.35	-2.00	-3.51	-8.64	-14.55	-11.13	1.13	10.61	5.09	206.11
Abu Dhabi										
ETISALAT.AD	16.12	0.12	0.12	-5.18	-12.20	-17.92	3.22	13.42	4.96	140.17
FAB.AD	12.16	0.00	0.00	-2.56	-8.02	-12.89	1.12	8.45	5.84	134.32
EMIRATES NBD	16.50	-0.90	-0.90	-2.94	-5.71	-4.62	0.96	4.81	7.27	104.21
DB ISLAMIC DB	5.65	1.62	1.62	1.62	-3.09	-1.22	0.95	6.29	7.96	40.90
EMAR.DU	7.74	2.25	2.25	-5.72	-5.26	-2.27	0.86	6.03	6.46	68.40
Qatar										
QNB	13.700	-1.23	-2.00	-1.23	-3.72	-17.12	1.21	8.65	4.74	126.57
INDUSTREIS QAT	11.960	-0.50	-0.83	-2.37	0.08	-8.56	1.98	14.97	6.52	72.38
QA ISLAMIC BK	17.590	-0.06	0.23	-3.88	-4.14	-18.19	1.45	10.05	4.12	41.58
MASRAF AL RAYA	2.470	0.94	1.65	-1.67	6.47	-6.97	0.96	16.10	4.05	22.98
MESAIEED PETRO	1.736	2.00	2.06	-9.54	-12.50	-2.91	1.35	21.64	4.95	21.82
Oman										
BANK MUSCAT	0.261	0.00	-0.38	-0.38	-0.38	-1.14	0.85	10.18	5.94	1.96
OMANTEL	1.049	0.00	-0.29	0.38	1.84	-1.04	1.28	11.84	5.72	0.79
BANK DHOFAR	0.155	0.00	0.00	-3.13	-3.13	-3.13	0.65	15.38	5.00	0.47
NAT BANK OF OMAN	0.276	0.00	0.36	7.39	6.15	-1.43	0.66	9.66	3.08	0.45
OMINVEST	0.375	0.00	0.00	-2.34	2.16	-5.13	0.79	8.15	5.33	0.25

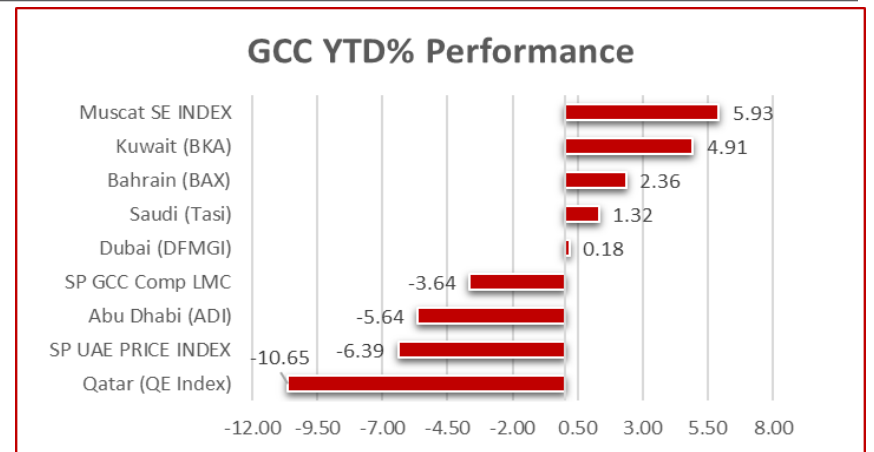
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Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
08-May-24	24.54%	14.81%	0.06%	2.32%	5.65%	17.88%	12.98%	6.27%	5.45%
15-may-24	24.55%	14.76%	0.06%	2.28%	5.59%	17.82%	12.08%	6.30%	5.44%

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 down today by -0.36 %The leading sector bottom performance indices today are Industrials -1.15 % Health care -1.14 % Consumer Disc -0.82 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 2.2%. STC have negative performance today by -0.78 %, Al Rajhi Bank have negative performance today by -0.25 %.



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