

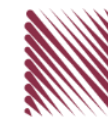


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 21st April 2024



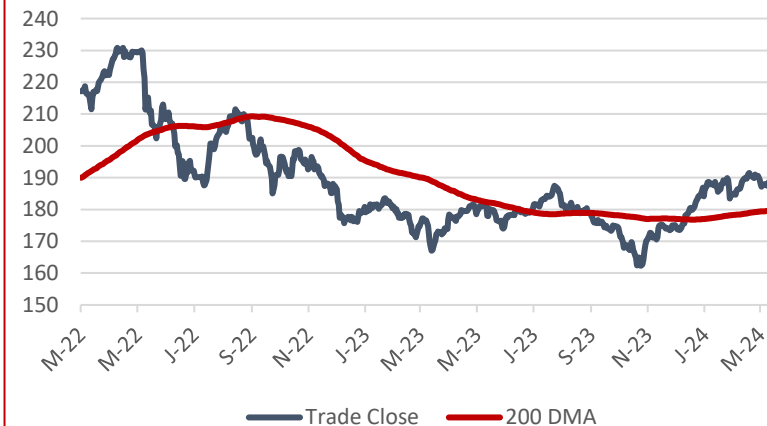


Sunday, April 21, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,518.2	0.13	0.13	0.94	0.94	4.60	2.38	21.32	3.06	10,824.26
Qatar (QE Index)	9,792.4	-0.38	-0.38	-0.56	-0.56	-9.59	1.13	11.17	4.85	492.42
Dubai (DFMGI)	4,174.6	-0.80	-1.64	-1.69	-1.69	2.83	1.37	8.24	5.80	597.82
Abu Dhabi (ADI)	9,126.1	-0.61	-1.20	-1.11	-1.11	-4.72	2.60	17.13	2.09	2,582.51
Bahrain (BAX)	2,016.9	-0.22	-0.22	-1.26	-1.26	2.31	0.87	10.64	4.26	8.21
Muscat SE INDEX	4,704.1	-0.28	-0.28	1.47	1.47	4.21	0.79	10.49	5.51	6.56
SP GCC Comp LMC	182.7	-0.17	-0.17	-1.47	-1.47	-1.23	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	131.9	0.00	0.00	-2.07	-2.07	-4.34				
Developed Markets										
MSCI World Index	3,255.6	-0.75	-2.85	-5.30	-5.30	2.73				
U.S. (S&P 500)	4,967.2	-0.88	-3.05	-5.46	-5.46	4.14	4.13	24.68	1.83	43,987.30
U.K. (FTSE 100)	7,895.9	0.24	-1.25	-0.71	-0.71	2.10	1.68	13.00	3.78	2,088.47
Japan (topix)	2,626.3	-1.91	-4.83	-5.14	-5.14	10.98	1.54	14.66	2.07	933,398.30
Emerging Markets										
MSCI EM Index	1,004.2	-1.42	-3.60	-3.74	-3.74	-1.91				
China (SSE Composite)	3,065.3	-0.29	1.52	0.79	0.79	3.04	1.36	12.00		44,025.04
India (Sensex)	73,088.3	0.83	-1.56	-0.76	-0.76	1.17	4.74	23.17	1.14	144,838.89
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,057.1	0.86	0.86	-3.69	-3.69	3.52	1.43	14.98	3.60	42.16
Kuwait Premier Index	7,711.3	0.89	0.89	-4.05	-4.05	3.13	1.56	16.53	3.41	34.80
Kuwait Main Index	5,875.1	0.68	0.68	-1.85	-1.85	5.48	1.02	9.90	4.57	7.35
Kuwait Sector										
Banking	1,738.2	0.76	0.76	-1.88	-1.88	5.51	1.71	17.43	3.07	25.84
Telecom	1,043.4	-0.12	-0.12	-2.04	-2.04	-5.59	1.53	9.91	8.05	3.19
Industrials	787.4	0.25	0.25	-24.68	-24.68	-13.27	0.83	12.11	4.47	2.66
Financial Services	1,322.7	1.96	1.96	-2.28	-2.28	9.11	1.03	12.85	3.38	4.35
Real Estate	1,280.2	0.58	0.58	-1.19	-1.19	5.55	0.97	13.48	2.07	2.71
Basic Materials	793.5	1.71	1.71	0.46	0.46	6.38	1.34	10.89	10.02	0.44
Health Care	403.1	28.03	28.03	17.33	17.33	-16.39	1.12	7.90	2.73	
Consumer Staples	821.6	0.33	0.33	6.33	6.33	24.75	1.78	21.36	1.51	0.25
Insurance	2,554.7	0.06	0.06	-0.50	-0.50	11.42	1.39	13.58	3.32	1.03
Consumer Discretionary	1,657.8	1.23	1.23	-5.36	-5.36	3.36				
Energy	1,012.7	0.00	0.00	-2.90	-2.90	6.71	0.83	9.76	4.97	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	400.0	-1.30	-1.30	-10.06	-10.06	-12.14				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell at Asia's open on Monday, dragged down by a renewed focus on market fundamentals, as Israel and Iran played down the risks of an escalation of hostilities in the Middle East after Israel's apparently small strike on Iran. Brent futures fell 54 cents, or 0.6%, to \$86.75 a barrel.

Kuwait Market

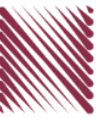
The market closed up by + 0.86% at 7,057.1 value traded 64.5 million KD, Premier market value reached 53.8 million KD up by + 0.89% at 7,711.3.

KSA Market

The market closed up by + 0.13% at 12,518.2.

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	0.854	0.59	0.59	-5.61	-5.61	0.30	1.73	13.86	3.90	7.11
KFH	0.734	0.96	0.96	0.51	0.51	10.20	2.18	21.13	2.50	12.56
ZAIN	0.492	0.41	0.41	-0.20	-0.20	-2.96	1.71	9.88	7.11	2.13
BOUBYAN BANK	0.628	1.62	1.62	1.62	1.62	4.67	2.48	33.48	1.20	2.49
AGILITY	0.325	-0.31	-0.31	-10.69	-10.69	14.75	0.47	9.93	3.08	0.87
Saudi Arabia										
ARAMCO	30.05	0.50	0.50	-2.59	-2.59	-8.94	4.74	16.06	5.64	7,272.10
SABIC	79.70	-1.48	-1.48	1.79	1.79	-4.55	1.43	183.26	4.27	239.10
STC	39.30	0.13	0.13	-0.76	-0.76	-2.72	2.48	14.78	4.07	196.50
AL-RAJHI BANK	79.10	-1.86	-1.86	-3.89	-3.89	-8.55	2.96	20.02	2.91	316.40
NCB	37.75	0.13	0.13	-6.09	-6.09	-2.33	1.28	11.68	4.64	226.50
Abu Dhabi										
ETISALAT.AD	17.56	-3.30	-4.46	-4.36	-4.36	-10.59	3.58	14.82	4.56	152.72
FAB.AD	12.80	-0.47	-4.19	-3.18	-3.18	-8.31	1.13	8.97	5.55	141.41
EMIRATES NBD	16.55	-1.19	-5.70	-5.43	-5.43	-4.34	0.95	4.98	7.25	104.54
DB ISLAMIC DB	5.68	-0.87	-1.39	-2.57	-2.57	-0.70	0.92	6.44	7.92	41.13
EMAR.DU	8.29	-1.07	-2.47	1.47	1.47	4.67	0.94	6.17	6.03	73.27
Qatar										
QNB	14.030	-0.50	-0.50	-1.41	-1.41	-15.12	1.24	8.86	4.63	129.59
INDUSTREIS QAT	12.100	-1.63	-1.63	1.26	1.26	-7.49	1.83	15.51	6.45	73.21
QA ISLAMIC BK	18.030	-1.04	-1.04	-1.74	-1.74	-16.14	1.49	10.30	4.02	42.60
MASRAF AL RAYA	2.518	-0.47	-0.47	8.53	8.53	-5.16	0.95	16.66	3.97	23.42
MESAIEED PETRO	1.881	-1.00	-1.00	-5.19	-5.19	5.20	1.38	21.83	4.57	23.63
Oman										
BANK MUSCAT	0.265	0.00	0.00	1.15	1.15	0.38	0.84	10.50	5.85	1.99
OMANTEL	1.050	0.57	0.57	1.94	1.94	-0.94	1.22	24.07	5.71	0.79
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.255	0.00	0.00	-1.92	-1.92	-8.93	0.61	9.15	3.33	0.41
OMINVEST	0.405	-0.98	-0.98	3.85	3.85	-3.57	0.88	8.26	4.94	0.27

* GCC Markets performance at the latest close.

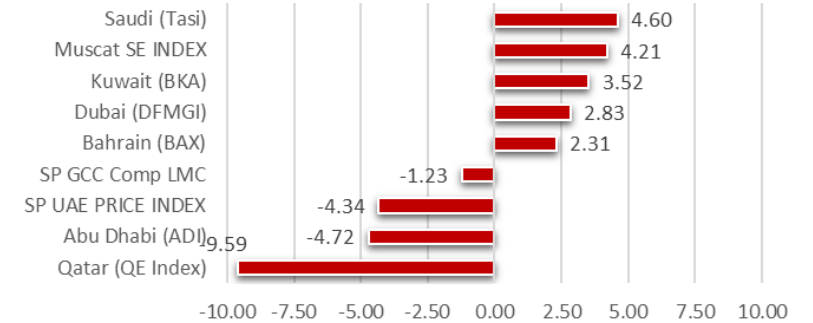
Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
10-April-24	24.61%	14.98%	0.06%	2.49%	5.79%	17.96%	12.85%	6.30%	5.38%
17-April-24	24.56%	14.94%	0.06%	2.47%	5.84%	17.96%	12.87%	6.29%	5.38%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.86 %The leading sector best performance indices today are Health care 28.03 % Financial services 1.96 % Basic materials 1.71 % respectively

KSA

Saudi Armco has a positive performance today by + 0.5 %, SABIC have negative performance today by -1.4%. STC has a positive performance today by + 0.13 %, Al Rajhi Bank have negative performance today by -1.86 %.



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