

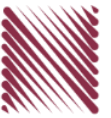


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 21st May 2024





Tuesday, May 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)	12,122.5	-0.02	-0.62	-2.20	-2.25	1.30	2.30	20.52	3.20	10,663.04
Qatar (QE Index)	9,716.3	0.40	0.14	-0.11	-1.33	-10.29	1.12	11.06	4.89	486.36
Dubai (DFMGI)	4,075.2	0.20	0.17	-1.94	-4.03	0.38	1.38	8.20	5.94	594.96
Abu Dhabi (ADI)	9,008.6	-0.32	-0.37	-0.65	-2.38	-5.94	2.58	16.07	2.12	2,539.83
Bahrain (BAX)	2,014.1	-0.19	0.25	-0.74	-1.40	2.16	0.87	10.97	4.30	8.20
Muscat SE INDEX	4,778.9	-0.06	-0.28	-0.11	3.09	5.87	0.82	10.26	5.70	6.62
SP GCC Comp LMC	178.5	0.18	-0.32	-1.74	-3.70	-3.46	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.2	0.14	0.59	-1.43	-4.04	-6.26				
Developed Markets										
MSCI World Index	3,479.8	0.08	0.21	5.28	1.22	9.80				
U.S. (S&P 500)	5,321.4	0.25	0.34	5.67	1.28	11.56	4.40	26.08	1.65	46,918.70
U.K. (FTSE 100)	8,416.5	-0.09	-0.05	3.34	5.83	8.83	1.80	15.23	3.62	2,221.61
Japan (topix)	2,759.7	-0.30	0.51	0.60	-0.32	16.62	1.44	15.34	2.09	972,941.30
Emerging Markets										
MSCI EM Index	1,093.4	-0.77	-0.58	4.53	4.81	6.80				
China (SSE Composite)	3,158.0	-0.42	0.12	1.71	3.84	6.15	1.36	12.00		44,025.04
India (Sensex)	73,953.3	-0.07	-0.07	-0.71	0.41	2.37	4.79	22.19	1.16	146,572.55
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,138.6	-0.19	-0.34	1.24	-2.58	4.71	1.46	15.40	3.57	43.18
Kuwait Premier Index	7,791.4	-0.26	-0.46	1.30	-3.05	4.20	1.59	16.80	3.39	35.57
Kuwait Main Index	5,976.5	0.13	0.24	0.96	-0.15	7.30	1.04	10.58	4.46	7.61
Kuwait Sector										
Banking	1,769.2	0.09	-0.18	2.22	-0.14	7.39	1.75	17.55	3.00	26.47
Telecom	1,000.3	-3.12	-2.51	-4.16	-6.08	-9.48	1.51	12.31	8.14	3.16
Industrials	751.4	-0.01	-0.87	-2.20	-28.12	-17.24	0.79	11.31	5.75	2.55
Financial Services	1,369.8	0.07	0.31	2.74	1.21	13.00	1.09	12.36	2.93	4.68
Real Estate	1,313.5	-0.02	-0.41	2.15	1.38	8.29	1.01	14.28	2.04	2.79
Basic Materials	831.9	-0.32	-1.00	-2.66	5.31	11.52	1.50	14.73	9.37	0.47
Health Care	462.4	0.00	-1.14	-5.11	34.57	-4.10	1.65	11.60	1.86	
Consumer Staples	895.9	0.00	4.27	7.57	15.95	36.04	1.94	19.88	2.29	0.27
Insurance	2,492.3	0.17	1.10	0.21	-2.92	8.70	1.36	12.27	3.19	1.00
Consumer Discretionary	1,652.4	-1.00	-1.42	-1.66	-5.67	3.02				
Energy	1,076.0	1.22	1.48	1.33	3.16	13.38	0.87	9.94	5.96	0.22
Technology	1,738.7	1.70	-1.65	-8.78	-8.78	200.63	2.11			0.02
Utilities	415.8	0.00	0.00	-4.82	-6.51	-8.67				

* 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 for a third straight session on Wednesday on expectations the Federal Reserve could keep U.S. interest rates higher for longer due to sustained inflation, potentially impacting fuel use in the world's largest oil consumer. Brent crude futures were down 43 cents, or 0.5%, to \$82.45 a barrel.

Kuwait Market

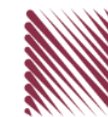
The market closed down by - 0.19% at 7,138.6 value traded 58.5 million KD, Premier market value reached 40.3 million KD down by - 0.26% at 7,791.4.

KSA Market

The market closed down by -0.02% at 12,122.5.

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	0.869	-0.11	-0.69	0.46	-3.95	2.06	1.71	13.61	3.84	7.24
KFH	0.746	0.27	0.13	3.61	2.15	12.00	2.18	21.95	2.46	12.77
ZAIN	0.456	-4.60	-3.39	-6.56	-7.51	-10.06	1.59	10.36	7.68	1.97
BOUBYAN BANK	0.578	-0.86	-2.36	-1.87	-0.86	2.11	2.43	30.84	1.31	2.43
AGILITY	0.306	-0.65	-2.24	-3.16	-15.91	8.04	0.82	8.98	6.54	0.82
Saudi Arabia										
ARAMCO	29.95	0.17	0.67	-0.50	-2.92	-9.24	4.76	16.52	6.26	7,248.29
SABIC	78.50	0.51	-2.97	-7.10	0.26	-5.99	1.41	180.51	4.20	235.51
STC	38.00	-0.13	0.00	0.93	-1.47	-3.42	2.35	14.10	4.21	190.01
AL-RAJHI BANK	79.20	-0.75	-1.25	-0.88	-3.77	-8.44	2.93	19.48	2.90	316.82
NCB	34.60	0.73	-2.81	-7.98	-13.93	-10.48	1.14	10.68	5.06	207.61
Abu Dhabi										
ETISALAT.AD	16.00	-0.74	-0.62	-5.88	-12.85	-18.53	3.19	13.32	5.00	139.13
FAB.AD	12.06	-0.82	-0.82	-3.37	-8.77	-13.61	1.11	8.38	5.89	133.21
EMIRATES NBD	16.50	0.00	-0.90	-2.94	-5.71	-4.62	0.96	4.81	7.27	104.21
DB ISLAMIC DB	5.60	-0.88	0.72	0.72	-3.95	-2.10	0.95	6.24	8.04	40.54
EMAR.DU	8.08	4.39	6.74	-1.58	-1.10	2.02	0.90	6.30	6.19	71.41
Qatar										
QNB	13.850	1.09	-0.93	-0.14	-2.67	-16.21	1.22	8.75	4.69	127.96
INDUSTREIS QAT	11.960	0.00	-0.83	-2.37	0.08	-8.56	1.98	14.97	6.52	72.38
QA ISLAMIC BK	17.800	1.19	1.42	-2.73	-3.00	-17.21	1.47	10.17	4.07	42.07
MASRAF AL RAYA	2.478	0.32	1.98	-1.35	6.81	-6.67	0.96	16.15	4.04	23.05
MESAIEED PETRO	1.800	3.69	5.82	-6.20	-9.27	0.67	1.40	22.44	4.78	22.62
Oman										
BANK MUSCAT	0.26	-0.38	-0.76	-0.76	-0.76	-1.52	0.85	10.14	5.96	1.95
OMANTEL	1.046	-0.29	-0.57	0.10	1.55	-1.32	1.28	11.81	5.74	0.78
BANK DHOFAR	0.153	-1.29	-1.29	-4.38	-4.38	-4.38	0.64	15.18	5.07	0.46
NAT BANK OF OMAN	0.277	0.36	0.73	7.78	6.54	-1.07	0.67	9.70	3.07	0.45
OMINVEST	0.375	0.00	0.00	-2.34	2.16	-5.13	0.79	8.15	5.33	0.25

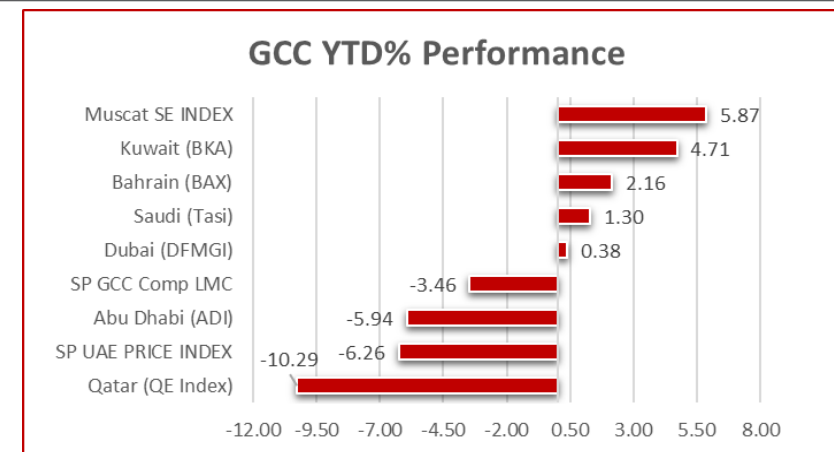
* GCC Markets performance at the latest close.

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 -0.19 %The leading sector bottom performance indices today are Telecom -3.12 % Consumer Disc -1 % Basic materials -0.32 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.17 %, SABIC have positive performance today by + 0.51 %, STC have negative performance today by -0.13 %, Al Rajhi Bank have negative performance today by -0.75 %.



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