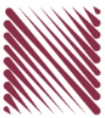


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 22nd May 2024





Wednesday, May 22, 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)	12,157.0	0.29	-0.34	-1.92	-1.97	1.58	2.31	20.54	3.18	10,691.17
Qatar (QE Index)	9,708.0	-0.09	0.06	-0.20	-1.41	-10.37	1.12	11.04	4.89	485.34
Dubai (DFMGI)	4,057.9	-0.42	-0.25	-2.36	-4.44	-0.05	1.37	8.15	5.97	592.27
Abu Dhabi (ADI)	8,973.0	-0.40	-0.76	-1.04	-2.76	-6.32	2.57	16.01	2.13	2,520.63
Bahrain (BAX)	2,015.7	0.08	0.33	-0.66	-1.32	2.24	0.87	10.98	4.30	8.21
Muscat SE INDEX	4,807.2	0.59	0.31	0.48	3.70	6.49	0.82	10.26	5.70	6.62
SP GCC Comp LMC	178.7	0.07	-0.25	-1.67	-3.63	-3.40	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.5	-0.54	0.05	-1.96	-4.55	-6.76				
Developed Markets										
MSCI World Index	3,465.6	-0.41	-0.20	4.85	0.81	9.35				
U.S. (S&P 500)	5,307.0	-0.27	0.07	5.39	1.00	11.26	4.42	26.16	1.65	47,039.96
U.K. (FTSE 100)	8,370.3	-0.55	-0.59	2.78	5.25	8.24	1.79	15.02	3.62	2,208.41
Japan (topix)	2,737.4	-0.81	-0.30	-0.21	-1.13	15.68	1.43	15.20	2.11	964,989.26
Emerging Markets										
MSCI EM Index	1,095.3	0.17	-0.41	4.72	4.99	6.99				
China (SSE Composite)	3,158.5	0.02	0.14	1.73	3.86	6.17	1.36	12.00		44,025.04
India (Sensex)	74,221.1	0.36	0.29	-0.35	0.77	2.74	4.81	22.28	1.16	147,184.54
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,142.7	0.06	-0.29	1.30	-2.52	4.77	1.46	15.36	3.58	43.12
Kuwait Premier Index	7,798.8	0.10	-0.37	1.39	-2.96	4.30	1.59	16.76	3.40	35.48
Kuwait Main Index	5,969.2	-0.12	0.12	0.83	-0.27	7.17	1.04	10.51	4.45	7.64
Kuwait Sector										
Banking	1,769.6	0.03	-0.16	2.24	-0.11	7.42	1.76	17.56	3.00	26.50
Telecom	1,002.3	0.19	-2.32	-3.97	-5.90	-9.31	1.47	11.92	8.40	3.06
Industrials	747.5	-0.51	-1.38	-2.70	-28.49	-17.66	0.79	11.24	5.74	2.55
Financial Services	1,375.2	0.39	0.70	3.14	1.60	13.44	1.09	12.24	2.94	4.70
Real Estate	1,319.5	0.46	0.05	2.62	1.84	8.79	1.01	14.30	2.04	2.79
Basic Materials	826.6	-0.64	-1.63	-3.28	4.64	10.81	1.50	14.68	9.40	0.47
Health Care	462.4	0.00	-1.14	-5.11	34.57	-4.10	1.65	11.51	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	2,484.3	-0.32	0.77	-0.11	-3.24	8.35	1.36	12.29	3.18	1.01
Consumer Discretionary	1,654.1	0.10	-1.32	-1.56	-5.57	3.13				
Energy	1,078.4	0.23	1.72	1.57	3.40	13.64	0.88	10.10	5.87	0.23
Technology	1,746.0	0.42	-1.23	-8.40	-8.40	201.89	2.15			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 eased for a fourth straight day on Thursday on worries that U.S. borrowing costs could be hiked again if inflation surged, a move that could hurt oil demand. Brent crude futures fell 27 cents, or 0.3%, to \$81.63 a barrel.

Kuwait Market

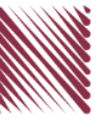
The market closed up by + 0.06% at 7,142.7 value traded 51.5 million KD, Premier market value reached 31.7 million KD up by + 0.10% at 7,798.8.

KSA Market

The market closed up by + 0.29% at 12,157.0.

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	0.12	-0.57	0.58	-3.84	2.18	1.71	13.63	3.83	7.25
KFH	0.746	0.00	0.13	3.61	2.15	12.00	2.18	21.95	2.46	12.77
ZAIN	0.459	0.66	-2.75	-5.94	-6.90	-9.47	1.60	10.42	7.63	1.99
BOUBYAN BANK	0.580	0.35	-2.03	-1.53	-0.52	2.47	2.44	30.95	1.30	2.44
AGILITY	0.306	0.00	-2.24	-3.16	-15.91	8.04	0.82	8.98	6.54	0.82
Saudi Arabia										
ARAMCO	30.05	0.33	1.01	-0.17	-2.59	-8.94	4.77	16.57	6.24	7,272.49
SABIC	78.00	-0.64	-3.58	-7.69	-0.38	-6.59	1.40	204.60	4.23	234.01
STC	37.80	-0.53	-0.53	0.40	-1.99	-3.93	2.34	14.03	4.23	189.01
AL-RAJHI BANK	80.20	1.26	0.00	0.38	-2.55	-7.28	2.96	19.73	2.87	320.82
NCB	35.15	1.59	-1.26	-6.52	-12.56	-9.06	1.16	10.85	4.98	210.91
Abu Dhabi										
ETISALAT.AD	16.08	0.50	-0.12	-5.41	-12.42	-18.13	3.21	13.39	4.98	139.30
FAB.AD	12.06	0.00	-0.82	-3.37	-8.77	-13.61	1.11	8.38	5.89	132.77
EMIRATES NBD	16.25	-1.52	-2.40	-4.41	-7.14	-6.07	0.95	4.74	7.38	102.31
DB ISLAMIC DB	5.58	-0.36	0.36	0.36	-4.29	-2.45	0.94	6.22	8.06	40.40
EMAR.DU	8.04	-0.50	6.21	-2.07	-1.59	1.52	0.90	6.26	6.22	70.79
Qatar										
QNB	13.730	-0.87	-1.79	-1.01	-3.51	-16.94	1.21	8.67	4.73	127.31
INDUSTREIS QAT	11.930	-0.25	-1.08	-2.61	-0.17	-8.79	1.98	14.93	6.54	72.38
QA ISLAMIC BK	17.690	-0.62	0.80	-3.33	-3.60	-17.72	1.46	10.11	4.10	41.72
MASRAF AL RAYA	2.482	0.16	2.14	-1.19	6.98	-6.52	0.96	16.18	4.03	22.99
MESAIEED PETRO	1.800	0.00	5.82	-6.20	-9.27	0.67	1.40	22.44	4.78	22.49
Oman										
BANK MUSCAT	0.26	0.00	-0.76	-0.76	-0.76	-1.52	0.85	10.14	5.96	1.95
OMANTEL	1.065	1.82	1.24	1.91	3.40	0.47	1.30	12.02	5.74	0.80
BANK DHOVAR	0.153	0.00	-1.29	-4.38	-4.38	-4.38	0.64	15.18	5.07	0.46
NAT BANK OF OMAN	0.277	0.00	0.73	7.78	6.54	-1.07	0.67	9.70	3.07	0.45
OMINVEST	0.378	0.80	0.80	-1.56	2.98	-4.37	0.80	8.21	5.33	0.25

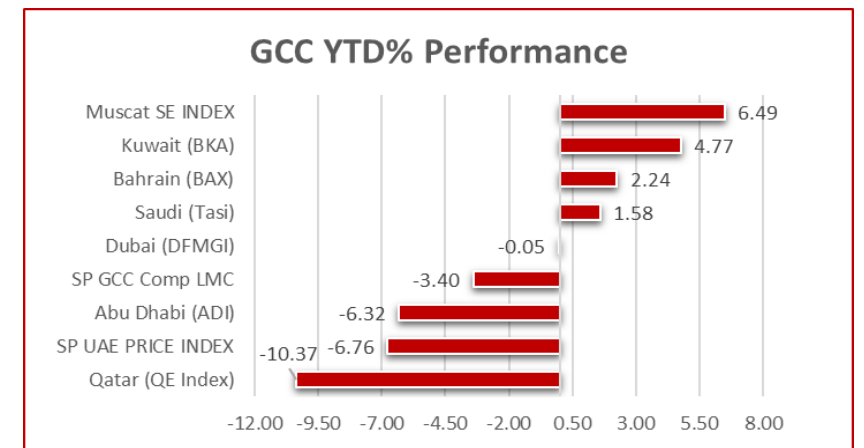
* GCC Markets performance at the latest close.

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 up today by + 0.06 %The leading sector best performance indices today are Real estate 0.46 % Technology 0.42 % Financial services 0.39 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.33 %, SABIC have negative performance today by -0.6%, STC have negative performance today by -0.53 %, Al Rajhi Bank has a positive performance today by + 1.26 %.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw