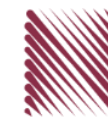


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 23th May 2024





Thursday, May 23, 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)	11,996.0	-1.32	-1.66	-3.22	-3.27	0.24	2.27	20.21	3.23	10,615.65
Qatar (QE Index)	9,562.1	-1.50	-1.45	-1.69	-2.89	-11.71	1.10	10.87	4.97	477.97
Dubai (DFMGI)	4,012.7	-0.27	-1.37	-3.44	-5.50	-1.16	1.36	8.05	6.04	585.05
Abu Dhabi (ADI)	8,833.5	-0.63	-2.30	-2.58	-4.28	-7.77	2.52	15.79	2.17	2,459.24
Bahrain (BAX)	2,020.2	0.23	0.55	-0.43	-1.10	2.47	0.87	10.95	4.31	8.17
Muscat SE INDEX	4,802.7	-0.09	0.22	0.39	3.60	6.39	0.82	10.30	5.68	6.64
SP GCC Comp LMC	175.5	-0.21	-2.00	-3.39	-5.31	-5.09	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.4	-1.09	-2.38	-4.34	-6.87	-9.03				
Developed Markets										
MSCI World Index	3,462.1	0.46	-0.30	4.74	0.71	9.24				
U.S. (S&P 500)	5,304.7	0.70	0.03	5.34	0.96	11.21	4.41	25.89	1.65	46,876.26
U.K. (FTSE 100)	8,317.6	-0.26	-1.22	2.13	4.59	7.56	1.78	14.94	3.66	2,201.39
Japan (topix)	2,742.5	-0.44	-0.11	-0.02	-0.94	15.90	1.43	15.23	2.11	966,155.28
Emerging Markets										
MSCI EM Index	1,083.0	-0.77	-1.53	3.54	3.81	5.79				
China (SSE Composite)	3,088.9	-0.88	-2.07	-0.51	1.57	3.83	1.36	12.00		44,025.04
India (Sensex)	75,410.4	-0.01	1.90	1.25	2.39	4.39	4.89	22.63	1.14	149,088.78
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,134.7	-0.11	-0.40	1.19	-2.63	4.66	1.46	15.33	3.59	43.07
Kuwait Premier Index	7,784.4	-0.18	-0.55	1.21	-3.14	4.11	1.58	16.74	3.40	35.45
Kuwait Main Index	5,983.5	0.24	0.36	1.08	-0.03	7.43	1.04	10.47	4.52	7.62
Kuwait Sector										
Banking	1,763.7	-0.34	-0.49	1.90	-0.45	7.05	1.75	17.51	3.01	26.42
Telecom	1,003.6	0.13	-2.20	-3.84	-5.77	-9.19	1.47	11.96	8.38	3.07
Industrials	747.0	-0.07	-1.45	-2.77	-28.54	-17.72	0.79	11.13	5.78	2.53
Financial Services	1,377.6	0.17	0.87	3.32	1.78	13.64	1.10	12.28	2.92	4.70
Real Estate	1,332.2	0.97	1.02	3.61	2.82	9.84	1.02	14.41	2.01	2.83
Basic Materials	831.9	0.65	-0.99	-2.65	5.32	11.53	1.50	14.68	10.53	0.47
Health Care	445.9	-3.56	-4.66	-8.49	29.78	-7.52	1.59	10.95	1.93	
Consumer Staples	929.5	3.75	8.17	11.60	20.30	41.14	2.02	20.63	2.21	0.28
Insurance	2,491.3	0.28	1.06	0.17	-2.96	8.66	1.36	12.28	3.18	1.00
Consumer Discretionary	1,646.5	-0.46	-1.77	-2.01	-6.00	2.66				
Energy	1,087.2	0.81	2.54	2.39	4.24	14.56	0.89	10.20	5.87	0.23
Technology	1,731.5	-0.83	-2.06	-9.16	-9.16	199.37	2.14			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

Crude oil futures bounced back from three-month lows on Friday but still booked to a loss for the week, as the summer driving season gets underway with the Memorial Day holiday. U.S. crude oil hit an intraday low of \$76.15 in morning trading, the lowest level since Feb. 26. Global benchmark Brent fell to \$80.65, the lowest level since Feb. 8.

Kuwait Market

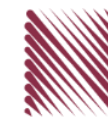
The market closed down by – 0.11% at 7,134.7 value traded 51.2 million KD, Premier market value reached 31.1 million KD down by – 0.18% at 7,784.4.

KSA Market

The market closed down by – 1.32% at 11,966.0.

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	0.863	-0.80	-1.37	-0.23	-4.62	1.36	1.70	13.52	3.86	7.19
KFH	0.744	-0.27	-0.13	3.33	1.88	11.70	2.18	21.90	2.47	12.74
ZAIN	0.459	0.00	-2.75	-5.94	-6.90	-9.47	1.60	10.42	7.63	1.99
BOUBYAN BANK	0.581	0.17	-1.86	-1.36	-0.35	2.64	2.44	31.00	1.30	2.44
AGILITY	0.302	-1.31	-3.51	-4.43	-17.01	6.63	0.81	8.87	6.62	0.81
Saudi Arabia										
ARAMCO	29.95	-0.33	0.67	-0.50	-2.92	-9.24	4.76	16.52	6.26	7,248.29
SABIC	76.80	-1.54	-5.07	-9.11	-1.92	-8.02	1.38	201.45	4.30	230.41
STC	36.85	-2.51	-3.03	-2.12	-4.45	-6.34	2.28	13.68	4.34	184.26
AL-RAJHI BANK	79.10	-1.37	-1.37	-1.00	-3.89	-8.55	2.92	19.46	2.91	316.42
NCB	33.95	-3.41	-4.63	-9.71	-15.55	-12.16	1.12	10.48	5.15	203.71
Abu Dhabi										
ETISALAT.AD	15.72	-2.04	-4.35	-9.41	-16.12	-21.59	3.07	12.82	5.19	133.92
FAB.AD	11.98	-1.17	-2.63	-5.13	-10.44	-15.19	1.09	8.23	6.00	130.79
EMIRATES NBD	15.70	-1.57	-5.71	-7.65	-10.29	-9.25	0.92	4.57	7.64	99.16
DB ISLAMIC DB	5.50	-0.36	-1.08	-1.08	-5.66	-3.85	0.93	6.13	8.18	39.82
EMAR.DU	7.82	-1.64	3.30	-4.75	-4.28	-1.26	0.87	6.09	6.39	69.11
Qatar										
QNB	13.500	-1.68	-3.43	-2.67	-5.13	-18.33	1.19	8.53	4.81	124.73
INDUSTREIS QAT	11.740	-1.59	-2.65	-4.16	-1.76	-10.24	1.94	14.69	6.64	71.05
QA ISLAMIC BK	17.460	-1.30	-0.51	-4.59	-4.85	-18.79	1.44	9.97	4.15	41.27
MASRAF AL RAYA	2.469	-0.52	1.60	-1.71	6.42	-7.01	0.96	16.09	4.05	22.97
MESAIEED PETRO	1.760	-2.22	3.47	-8.29	-11.29	-1.57	1.37	21.94	4.89	22.12
Oman										
BANK MUSCAT	0.26	0.00	-0.76	-0.76	-0.76	-1.52	0.85	10.14	5.96	1.95
OMANTEL	1.059	0.67	0.67	1.34	2.82	-0.09	1.29	11.96	5.67	0.79
BANK DHOFAR	0.152	-0.65	-1.94	-5.00	-5.00	-5.00	0.63	15.08	5.10	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	0.00	0.80	-1.56	2.98	-4.37	0.80	8.21	5.29	0.25

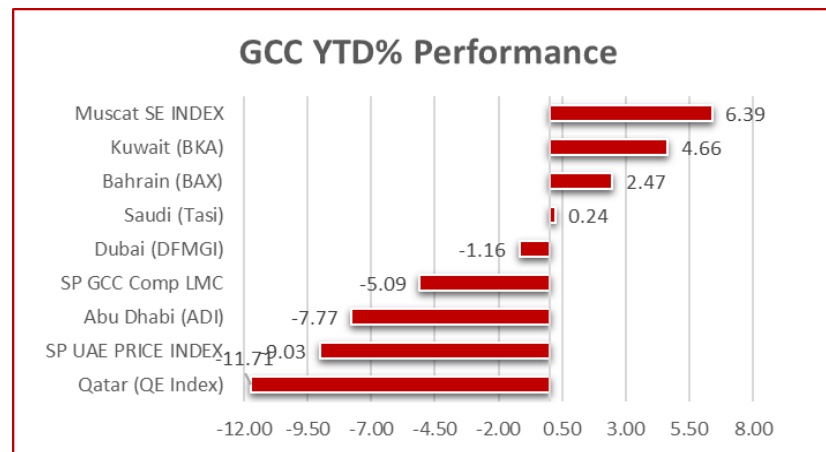
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
15-May-24	24.55%	14.76%	0.06%	2.28%	5.59%	17.82%	12.08%	6.30%	5.44%
22-May-24	24.62%	14.79%	0.06%	2.32%	5.63%	17.74%	12.15%	6.25%	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 -0.11 % The leading sector bottom performance indices today are Health care -3.56 % Technology -0.83 % Consumer Disc -0.46 % respectively.

KSA

Saudi Armco have negative performance today by -0.33 %, SABIC have negative performance today by -1.5%, STC have negative performance today by -2.51 %, Al Rajhi Bank have negative performance today by -1.37 %.



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