

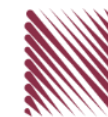


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 23th April 2024





Tuesday, April 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)	12,484.4	-0.20	-0.14	0.67	0.67	4.32	2.37	21.21	3.07	10,821.39
Qatar (QE Index)	9,711.0	0.48	-1.20	-1.38	-1.38	-10.34	1.13	11.07	4.89	488.60
Dubai (DFMGI)	4,166.3	-0.03	-0.20	-1.88	-1.88	2.62	1.37	8.21	5.82	593.79
Abu Dhabi (ADI)	9,051.4	-0.27	-0.82	-1.91	-1.91	-5.50	2.57	17.00	2.11	2,559.20
Bahrain (BAX)	2,017.0	0.03	-0.22	-1.25	-1.25	2.31	0.87	10.65	4.26	8.21
Muscat SE INDEX	4,696.3	-0.03	-0.44	1.31	1.31	4.04	0.79	10.47	5.52	6.54
SP GCC Comp LMC	181.5	-0.19	-0.79	-2.09	-2.09	-1.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.2	-0.58	-1.25	-3.29	-3.29	-5.53				

Developed Markets

MSCI World Index	3,322.5	1.23	2.06	-3.35	-3.35	4.84				
U.S. (S&P 500)	5,070.6	1.20	2.08	-3.50	-3.50	6.30	4.16	24.89	1.82	44,361.52
U.K. (FTSE 100)	8,044.8	0.26	1.89	1.16	1.16	4.03	1.71	13.24	3.71	2,127.53
Japan (topix)	2,666.2	0.14	1.52	-3.70	-3.70	12.67	1.56	14.87	2.04	949,054.63

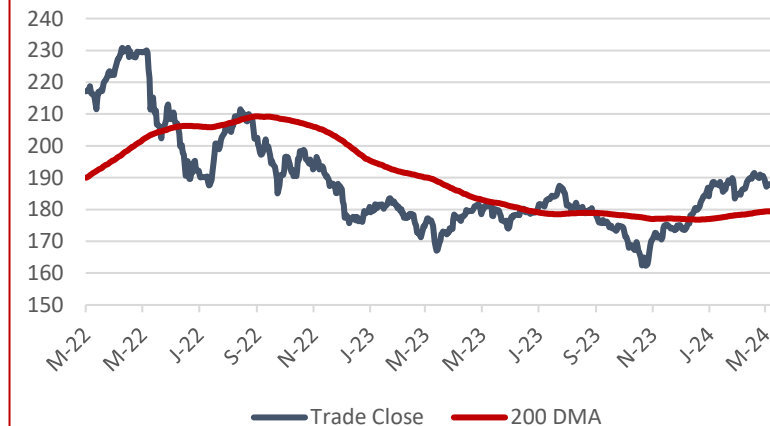
Emerging Markets

MSCI EM Index	1,019.3	0.74	1.51	-2.29	-2.29	-0.43				
China (SSE Composite)	3,022.0	-0.74	-1.41	-0.63	-0.63	1.58	1.36	12.00		44,025.04
India (Sensex)	73,738.5	0.12	0.89	0.12	0.12	2.07	4.78	23.36	1.13	146,298.80

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,074.7	0.04	1.11	-3.45	-3.45	3.78	1.44	15.11	3.57	42.61
Kuwait Premier Index	7,719.8	0.00	1.00	-3.94	-3.94	3.25	1.57	16.66	3.38	35.15
Kuwait Main Index	5,930.3	0.23	1.62	-0.92	-0.92	6.47	1.04	10.06	4.51	7.46
Kuwait Sector										
Banking	1,743.7	0.05	1.08	-1.57	-1.57	5.84	1.73	17.57	3.05	26.10
Telecom	1,042.6	0.12	-0.19	-2.11	-2.11	-5.66	1.52	9.88	8.07	3.18
Industrials	764.5	-1.47	-2.65	-26.86	-26.86	-15.79	0.82	11.96	4.53	2.63
Financial Services	1,328.7	0.30	2.42	-1.83	-1.83	9.61	1.06	13.14	3.31	4.44
Real Estate	1,287.6	0.58	1.16	-0.62	-0.62	6.16	0.98	13.61	2.06	2.72
Basic Materials	840.1	1.06	7.68	6.35	6.35	12.62	1.43	11.60	9.40	0.47
Health Care	464.4	-3.43	47.48	35.15	35.15	-3.69	1.71	12.07	1.79	
Consumer Staples	835.0	0.33	1.96	8.06	8.06	26.78	1.81	21.71	1.48	0.25
Insurance	2,563.6	1.01	0.40	-0.15	-0.15	11.81	1.38	13.51	3.34	1.02
Consumer Discretionary	1,660.1	-0.03	1.37	-5.23	-5.23	3.50				
Energy	1,018.9	0.44	0.61	-2.31	-2.31	7.37	0.83	9.78	4.97	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	402.6	0.66	-0.65	-9.47	-9.47	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose in early trade on Wednesday, adding to gains in the previous session, after industry data showed a surprise drop in U.S. crude stocks last week, a positive sign for demand, and attention shifted away from hostilities in the Middle East. Brent crude futures rose 9 cents, or 0.1%, to \$88.51 a barrel.

Kuwait Market

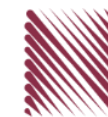
The market closed up by + 0.04% at 7,074.7 value traded 53.7 million KD, Premier market value reached 44.1 million KD up by + 0.001% at 7,719.8.

KSA Market

The market closed down by - 0.2% at 12,484.4.

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	0.867	0.23	2.12	-4.17	-4.17	1.83	1.75	14.07	3.84	7.21
KFH	0.731	0.00	0.55	0.10	0.10	9.75	2.17	21.05	2.51	12.50
ZAIN	0.491	0.00	0.20	-0.41	-0.41	-3.16	1.71	9.86	7.13	2.12
BOUBAYAN BANK	0.590	-0.34	1.20	1.20	1.20	4.23	2.47	33.33	1.28	2.48
AGILITY	0.310	-0.32	-4.91	-14.81	-14.81	9.46	0.45	9.47	3.23	0.83
Saudi Arabia										
ARAMCO	30.10	-0.17	0.67	-2.43	-2.43	-8.79	4.75	16.08	5.63	7,284.01
SABIC	79.80	1.14	-1.36	1.92	1.92	-4.43	1.43	183.49	4.26	239.39
STC	38.45	-0.90	-2.04	-2.90	-2.90	-4.83	2.43	14.46	4.16	192.24
AL-RAJHI BANK	78.70	0.13	-2.36	-4.37	-4.37	-9.02	2.95	19.92	2.92	314.79
NCB	37.40	-0.40	-0.80	-6.97	-6.97	-3.23	1.26	11.57	4.68	224.39
Abu Dhabi										
ETISALAT.AD	17.00	-0.12	-3.19	-7.41	-7.41	-13.44	3.47	14.35	4.71	147.85
FAB.AD	12.42	-1.74	-2.97	-6.05	-6.05	-11.03	1.09	8.71	5.72	137.21
EMIRATES NBD	15.65	-3.69	-5.44	-10.57	-10.57	-9.54	0.90	4.71	7.67	98.85
DB ISLAMIC DB	5.71	0.53	0.53	-2.06	-2.06	-0.17	0.93	6.48	7.88	41.34
EMAR.DU	8.38	0.96	1.09	2.57	2.57	5.81	0.95	6.24	5.97	74.07
Qatar										
QNB	13.900	1.24	-1.42	-2.32	-2.32	-15.91	1.23	8.78	4.68	128.39
INDUSTREIS QAT	12.000	0.00	-2.44	0.42	0.42	-8.26	1.82	15.38	6.50	72.60
QA ISLAMIC BK	17.800	0.68	-2.31	-3.00	-3.00	-17.21	1.47	10.17	4.07	42.06
MASRAF AL RAYA	2.495	0.60	-1.38	7.54	7.54	-6.03	0.94	16.51	4.01	23.20
MESAIEED PETRO	1.885	0.27	-0.79	-4.99	-4.99	5.43	1.39	21.88	4.56	23.68
Oman										
BANK MUSCAT	0.263	-0.75	-0.75	0.38	0.38	-0.38	0.84	10.42	5.89	1.97
OMANTEL	1.050	-0.19	0.57	1.94	1.94	-0.94	1.22	24.07	5.71	0.79
BANK DHOFAR	0.158	0.00	-1.25	-1.25	-1.25	-1.25	0.65	16.92	4.91	0.47
NAT BANK OF OMAN	0.252	0.00	-1.18	-3.08	-3.08	-10.00	0.61	9.04	3.37	0.41
OMINVEST	0.409	0.74	0.00	4.87	4.87	-2.62	0.89	8.34	4.89	0.27

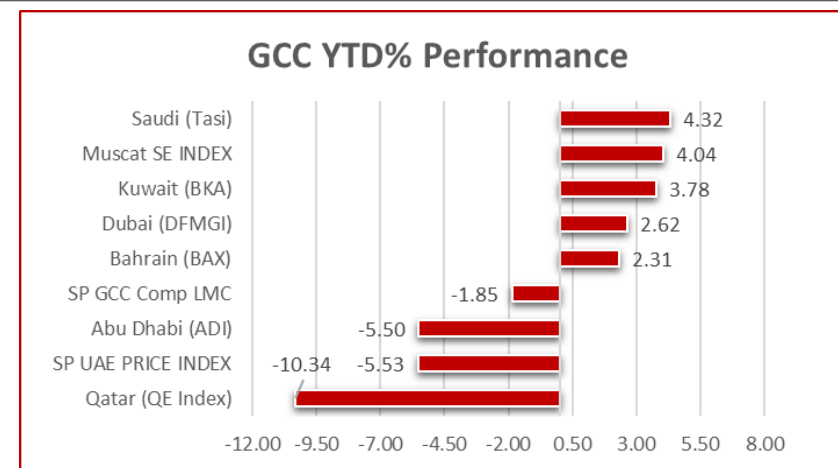
* GCC Markets performance at the latest close.

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 Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.04 %The leading sector best performance indices today are Basic materials 1.06 % Insurance 1.01 % Utilities 0.66 % respectively

KSA

Saudi Armco have negative performance today by -0.17 %, SABIC have positive performance today by + 1.14%. STC have negative performance today by -0.9 %, Al Rajhi Bank has a positive performance today by + 0.13 %



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