



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 24th April 2024

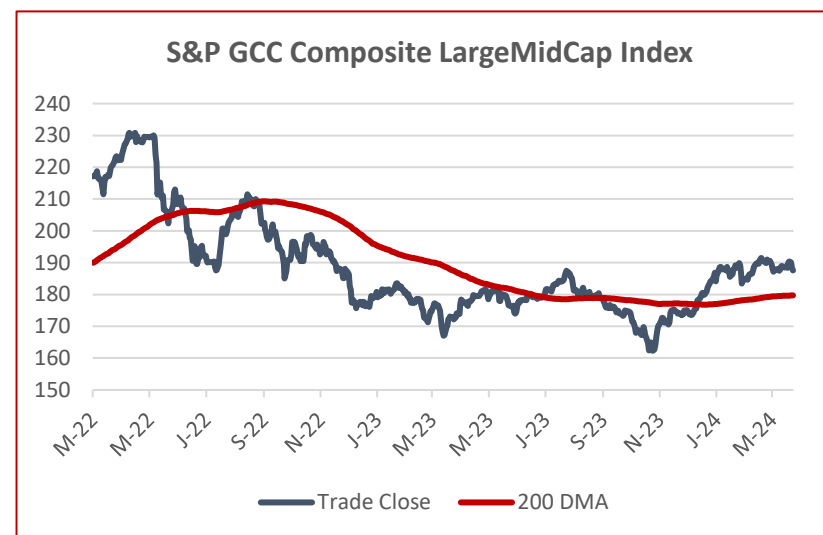




Wednesday, April 24, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,355.7	-1.03	-1.17	-0.37	-0.37	3.24	2.34	21.03	3.11	10,777.41
Qatar (QE Index)	9,665.9	-0.46	-1.66	-1.84	-1.84	-10.75	1.12	11.03	4.91	486.67
Dubai (DFMGI)	4,167.3	0.02	-0.17	-1.86	-1.86	2.65	1.36	8.17	5.83	594.61
Abu Dhabi (ADI)	9,045.0	-0.07	-0.89	-1.98	-1.98	-5.56	2.57	16.98	2.11	2,551.46
Bahrain (BAX)	2,013.1	-0.19	-0.41	-1.45	-1.45	2.11	0.87	10.61	4.28	8.20
Muscat SE INDEX	4,707.1	0.23	-0.21	1.54	1.54	4.28	0.79	10.49	5.55	6.54
SP GCC Comp LMC	180.4	-0.61	-1.40	-2.69	-2.69	-2.45	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.0	-0.19	-1.44	-3.48	-3.48	-5.72				
Developed Markets										
MSCI World Index	3,323.3	0.02	2.08	-3.33	-3.33	4.86				
U.S. (S&P 500)	5,071.6	0.02	2.10	-3.48	-3.48	6.33	4.21	25.25	1.80	44,889.65
U.K. (FTSE 100)	8,040.4	-0.06	1.83	1.10	1.10	3.97	1.71	13.28	3.71	2,125.99
Japan (topix)	2,710.7	1.67	3.21	-2.09	-2.09	14.55	1.59	15.12	2.01	964,434.30
Emerging Markets										
MSCI EM Index	1,034.7	1.51	3.04	-0.82	-0.82	1.07				
China (SSE Composite)	3,044.8	0.76	-0.67	0.12	0.12	2.35	1.36	12.00		44,025.04
India (Sensex)	73,852.9	0.16	1.05	0.27	0.27	2.23	4.79	23.39	1.13	146,390.24
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,061.1	-0.19	0.91	-3.63	-3.63	3.58	1.44	14.99	3.57	42.62
Kuwait Premier Index	7,705.3	-0.19	0.82	-4.12	-4.12	3.05	1.57	16.46	3.38	35.15
Kuwait Main Index	5,917.4	-0.22	1.40	-1.14	-1.14	6.24	1.03	10.06	4.50	7.47
Kuwait Sector										
Banking	1,742.5	-0.07	1.01	-1.64	-1.64	5.77	1.73	17.28	3.04	26.12
Telecom	1,036.3	-0.61	-0.80	-2.70	-2.70	-6.23	1.53	9.89	8.06	3.19
Industrials	753.4	-1.45	-4.07	-27.92	-27.92	-17.01	0.81	11.77	4.59	2.59
Financial Services	1,327.1	-0.12	2.30	-1.95	-1.95	9.48	1.06	13.17	3.30	4.45
Real Estate	1,286.4	-0.09	1.07	-0.71	-0.71	6.06	0.98	13.70	2.05	2.74
Basic Materials	844.9	0.58	8.30	6.96	6.96	13.27	1.44	11.72	9.31	0.47
Health Care	449.3	-3.25	42.69	30.76	30.76	-6.82	1.66	11.65	1.85	
Consumer Staples	834.3	-0.08	1.88	7.98	7.98	26.68	1.81	21.78	1.48	0.25
Insurance	2,561.9	-0.07	0.34	-0.22	-0.22	11.73	1.40	13.52	3.31	1.03
Consumer Discretionary	1,662.7	0.15	1.53	-5.08	-5.08	3.66				
Energy	1,046.0	2.66	3.29	0.29	0.29	10.22	0.84	9.77	4.94	0.21
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	402.6	0.00	-0.65	-9.47	-9.47	-11.56				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased in early trade on Thursday as concerns about a potential slowdown in the U.S. economy amid prospects for delayed interest rate cuts outweighed worries over the risk of expanding conflict in the Middle East. Brent crude futures dipped 9 cents, or 0.1%, to \$86.95 a barrel.

Kuwait Market

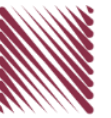
The market closed down by -0.19% at 7,061.1 value traded 44.4 million KD, Premier market value reached 38.0 million KD down by -0.19% at 7,705.3.

KSA Market

The market closed down by -1.03% at 12,355.7.

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	0.23	2.36	-3.95	-3.95	2.06	1.71	13.61	3.84	7.23
KFH	0.730	-0.14	0.41	-0.04	-0.04	9.60	2.17	21.02	2.51	12.49
ZAIN	0.487	-0.81	-0.61	-1.22	-1.22	-3.94	1.69	9.78	7.19	2.11
BOUBYAN BANK	0.588	-0.34	0.85	0.85	0.85	3.88	2.47	31.38	1.28	2.47
AGILITY	0.298	-3.87	-8.59	-18.11	-18.11	5.22	0.43	9.10	3.36	0.80
Saudi Arabia										
ARAMCO	30.10	0.00	0.67	-2.43	-2.43	-8.79	4.75	16.08	5.63	7,284.01
SABIC	78.90	-1.13	-2.47	0.77	0.77	-5.51	1.41	181.43	4.31	236.69
STC	38.25	-0.52	-2.55	-3.41	-3.41	-5.32	2.41	14.38	4.18	191.24
AL-RAJHI BANK	78.60	-0.13	-2.48	-4.50	-4.50	-9.13	2.94	19.90	2.93	314.39
NCB	36.95	-1.20	-1.99	-8.08	-8.08	-4.40	1.25	11.43	4.74	221.69
Abu Dhabi										
ETISALAT.AD	16.80	-1.18	-4.33	-8.50	-8.50	-14.46	3.43	14.18	4.76	146.10
FAB.AD	12.44	0.16	-2.81	-5.90	-5.90	-10.89	1.10	8.72	5.71	137.43
EMIRATES NBD	16.25	3.83	-1.81	-7.14	-7.14	-6.07	0.93	4.89	7.38	102.64
DB ISLAMIC DB	5.63	-1.40	-0.88	-3.43	-3.43	-1.57	0.95	6.27	7.99	40.76
EMAR.DU	8.23	-1.79	-0.72	0.73	0.73	3.91	0.94	6.13	6.08	72.74
Qatar										
QNB	13.900	0.00	-1.42	-2.32	-2.32	-15.91	1.23	8.78	4.68	128.39
INDUSTREIS QAT	12.080	0.67	-1.79	1.09	1.09	-7.65	1.83	15.48	6.46	73.08
QA ISLAMIC BK	17.620	-1.01	-3.29	-3.98	-3.98	-18.05	1.45	10.07	4.11	41.63
MASRAF AL RAYA	2.481	-0.56	-1.94	6.94	6.94	-6.55	0.94	16.41	4.03	23.07
MESAIEED PETRO	1.861	-1.27	-2.05	-6.20	-6.20	4.08	1.37	21.60	4.62	23.38
Oman										
BANK MUSCAT	0.262	-0.38	-1.13	0.00	0.00	-0.76	0.84	10.38	5.92	1.97
OMANTEL	1.048	-0.19	0.38	1.75	1.75	-1.13	1.22	24.02	5.73	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	0.405	-0.98	-0.98	3.85	3.85	-3.57	0.88	8.26	4.94	0.27

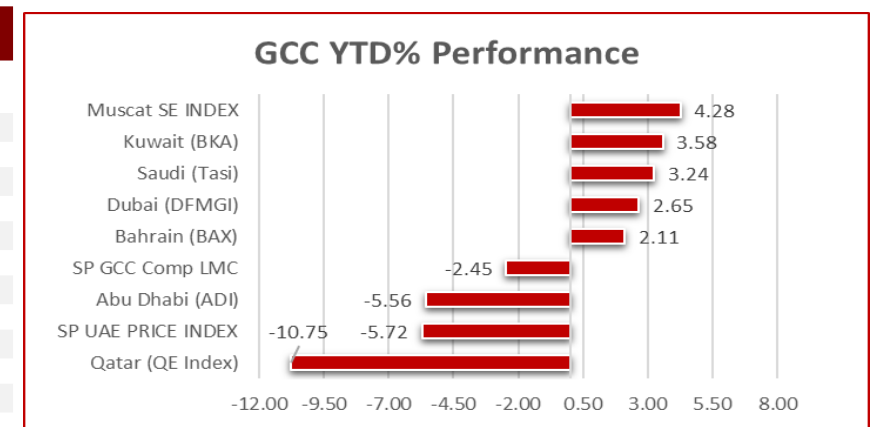
* GCC Markets performance at the latest close.

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 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 Health care -3.25 % Industrials -1.45 % Telecom -0.61 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -1.127%. STC have negative performance today by -0.52 %, Al Rajhi Bank have negative performance today by -0.13 %.



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