



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 25th April 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,254.5	-0.82	-1.98	-1.19	-1.19	2.40	2.33	20.83	3.14	10,744.59
Qatar (QE Index)	9,637.6	-0.29	-1.95	-2.13	-2.13	-11.02	1.12	11.01	4.92	485.23
Dubai (DFMGI)	4,148.2	-0.52	-0.63	-2.31	-2.31	2.18	1.36	8.04	5.86	596.07
Abu Dhabi (ADI)	9,042.3	0.01	-0.92	-2.01	-2.01	-5.59	2.57	16.85	2.11	2,534.34
Bahrain (BAX)	2,016.9	0.19	-0.23	-1.26	-1.26	2.30	0.87	10.63	4.27	8.23
Muscat SE INDEX	4,713.6	0.14	-0.07	1.68	1.68	4.42	0.80	10.49	5.53	6.56
SP GCC Comp LMC	179.5	0.04	-1.89	-3.17	-3.17	-2.94	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.1	0.18	-1.30	-3.34	-3.34	-5.58				
Developed Markets										
MSCI World Index	3,335.1	0.86	2.44	-2.99	-2.99	5.23				
U.S. (S&P 500)	5,100.0	1.02	2.67	-2.94	-2.94	6.92	4.22	25.22	1.72	45,141.62
U.K. (FTSE 100)	8,139.8	0.75	3.09	2.35	2.35	5.26	1.73	13.43	3.67	2,152.78
Japan (topix)	2,686.5	0.86	2.29	-2.97	-2.97	13.53	1.56	14.89	2.05	954,864.17
Emerging Markets										
MSCI EM Index	1,041.5	1.26	3.72	-0.16	-0.16	1.74				
China (SSE Composite)	3,088.6	1.17	0.76	1.56	1.56	3.82	1.36	12.00		44,025.04
India (Sensex)	73,730.2	-0.82	0.88	0.11	0.11	2.06	4.78	22.57	1.14	145,969.94
Kuwait										
Kuwait All Share Index	7,026.1	-0.50	0.41	-4.11	-4.11	3.06	1.43	14.96	3.59	42.32
Kuwait Premier Index	7,663.1	-0.55	0.26	-4.65	-4.65	2.49	1.56	16.44	3.40	34.89
Kuwait Main Index	5,902.9	-0.24	1.15	-1.38	-1.38	5.98	1.03	10.05	4.52	7.43
Kuwait Sector										
Banking	1,727.9	-0.84	0.16	-2.47	-2.47	4.88	1.72	17.26	3.07	25.88
Telecom	1,036.9	0.06	-0.74	-2.65	-2.65	-6.18	1.52	9.84	8.11	3.17
Industrials	754.7	0.16	-3.91	-27.81	-27.81	-16.88	0.80	11.60	4.65	2.56
Financial Services	1,334.8	0.58	2.89	-1.39	-1.39	10.11	1.06	13.21	3.29	4.47
Real Estate	1,280.7	-0.44	0.62	-1.15	-1.15	5.59	0.98	13.86	2.07	2.72
Basic Materials	841.7	-0.38	7.89	6.55	6.55	12.84	1.44	11.75	9.29	0.48
Health Care	450.1	0.19	42.95	31.00	31.00	-6.64	1.60	11.30	1.91	
Consumer Staples	840.1	0.70	2.59	8.73	8.73	27.57	1.82	21.92	1.47	0.26
Insurance	2,557.0	-0.19	0.15	-0.41	-0.41	11.52	1.39	13.48	3.32	1.03
Consumer Discretionary	1,651.5	-0.67	0.85	-5.72	-5.72	2.97				
Energy	1,037.3	-0.84	2.42	-0.55	-0.55	9.30	0.85	9.99	4.86	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	407.9	1.31	0.65	-8.29	-8.29	-10.41				

* 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 on Friday to snap a two-week losing streak, drawing support from concerns about tensions in the Middle East. U.S. West Texas Intermediate crude futures rose 28 cents, or 0.34%, to settle at \$83.85 a barrel. Brent crude futures rose 49 cents, or 0.55%, to settle at \$89.50 a barrel. U.S. crude oil rose 0.85% for the week while the global benchmark gained 2.53.

Kuwait Market

The market closed down by -0.50% at 7,026.1 value traded 42.4 million KD, Premier market value reached 36.7 million KD down by - 0.55% at 7,663.1.

KSA Market

The market closed down by - 0.82% at 12,254.5.

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	0.863	-0.69	1.65	-4.62	-4.62	1.36	1.70	13.52	3.86	7.19
KFH	0.723	-0.96	-0.55	-1.00	-1.00	8.55	2.12	21.28	2.54	12.37
ZAIN	0.485	-0.41	-1.02	-1.62	-1.62	-4.34	1.68	9.74	7.22	2.10
BOUBAYAN BANK	0.583	-0.85	0.00	0.00	0.00	3.00	2.45	31.11	1.29	2.45
AGILITY	0.303	1.68	-7.06	-16.74	-16.74	6.98	0.44	9.25	3.30	0.81
Saudi Arabia										
ARAMCO	30.10	0.00	0.67	-2.43	-2.43	-8.79	4.75	16.08	5.63	7,284.20
SABIC	78.80	-0.13	-2.60	0.64	0.64	-5.63	1.41	181.20	4.31	236.40
STC	38.35	0.26	-2.29	-3.16	-3.16	-5.07	2.42	14.42	4.17	191.75
AL-RAJHI BANK	77.50	-1.40	-3.85	-5.83	-5.83	-10.40	2.90	19.62	2.97	310.00
NCB	36.95	0.00	-1.99	-8.08	-8.08	-4.40	1.25	11.43	4.74	221.70
Abu Dhabi										
ETISALAT.AD	16.80	1.07	-3.30	-7.52	-7.52	-13.54	3.46	14.33	4.71	147.67
FAB.AD	12.42	0.32	-2.66	-5.75	-5.75	-10.74	1.10	8.73	5.70	137.65
EMIRATES NBD	16.75	1.21	1.21	-4.29	-4.29	-3.18	0.98	4.88	7.16	105.80
DB ISLAMIC DB	5.50	0.00	-3.17	-5.66	-5.66	-3.85	0.93	6.13	8.18	39.82
EMAR.DU	8.14	-0.12	-1.81	-0.37	-0.37	2.78	0.93	6.06	6.14	71.95
Qatar										
QNB	13.850	-0.36	-1.77	-2.67	-2.67	-16.21	1.22	8.75	4.69	127.92
INDUSTREIS QAT	12.000	-0.66	-2.44	0.42	0.42	-8.26	1.82	15.38	6.50	72.60
QA ISLAMIC BK	17.840	1.25	-2.09	-2.78	-2.78	-17.02	1.47	10.19	4.06	42.15
MASRAF AL RAYA	2.475	-0.24	-2.17	6.68	6.68	-6.78	0.94	16.37	4.04	23.02
MESAIEED PETRO	1.890	1.56	-0.53	-4.74	-4.74	5.70	1.39	21.93	4.55	23.74
Oman										
BANK MUSCAT	0.264	0.76	-0.38	0.76	0.76	0.00	0.84	10.46	5.87	1.98
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	0.403	-0.49	-1.47	3.33	3.33	-4.05	0.88	8.22	4.96	0.27

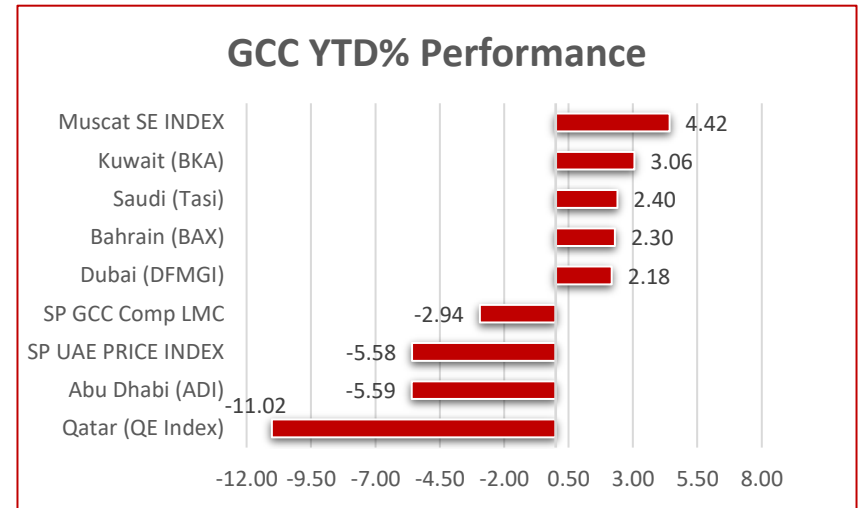
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
17-April-24	24.56%	14.94%	0.06%	2.47%	5.84%	17.96%	12.87%	6.29%	5.38%
24-April-24	24.52%	14.97%	0.06%	2.37%	5.49%	17.92%	12.95%	6.27%	5.42%

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 -0.5 %The leading sector bottom performance indices today are Banking -0.84 % Energy -0.84 % Consumer Disc -0.67 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 0.126%. STC has a positive performance today by + 0.26 %, Al Rajhi Bank have negative performance today by -1.4 %



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