

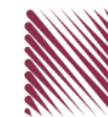


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday , March 25, 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)	12,656.9	-1.09	-1.39	0.21	5.76	5.76	2.44	21.96	2.94	11,006.80
Qatar (QE Index)	10,092.7	-1.20	-1.16	-3.65	-6.81	-6.81	1.20	11.64	4.68	515.16
Dubai (DFMGI)	4,281.6	0.03	0.03	-0.63	5.46	5.46	1.39	8.43	5.66	611.39
Abu Dhabi (ADI)	9,319.5	-0.02	-0.02	0.70	-2.70	-2.70	2.65	17.54	2.09	2,661.13
Bahrain (BAX)	2,075.9	0.39	1.23	3.51	5.29	5.29	0.83	10.88	4.54	7.90
Muscat SE INDEX	4,782.6	-0.22	-0.18	5.00	5.95	5.95	0.80	10.62	5.43	6.69
SP GCC Comp LMC	190.1	-0.13	-0.13	-0.18	2.79	2.79	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.6	0.00	0.00	0.83	-0.88	-0.88				
Developed Markets										
MSCI World Index	3,428.1	-0.19	1.94	2.72	8.17	8.17				
U.S. (S&P 500)	5,218.2	-0.31	-0.31	2.39	9.40	9.40	4.36	25.94	1.73	46,229.22
U.K. (FTSE 100)	7,917.6	-0.17	-0.17	3.77	2.38	2.38	1.70	13.01	3.75	2,094.44
Japan (topix)	2,777.6	-1.26	-1.26	3.81	17.38	17.38	1.64	15.50	1.96	993,675.04
Emerging Markets										
MSCI EM Index	1,039.3	-0.86	0.44	1.80	1.52	1.52				
China (SSE Composite)	3,026.3	-0.71	-0.71	0.37	1.73	1.73	1.36	12.00		44,025.04
India (Sensex)	72,831.9	0.26	0.26	0.46	0.82	0.82	4.72	23.23	1.13	144,741.42

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,396.1	-0.27	-0.27	-0.60	8.49	8.49	1.52	14.19	3.33	44.62
Kuwait Premier Index	8,091.6	-0.34	-0.32	-0.83	8.22	8.22	1.67	17.15	3.14	36.87
Kuwait Main Index	6,119.7	0.11	-0.02	0.55	9.88	9.88	1.05	7.33	4.30	7.76
Kuwait Sector										
Banking	1,789.0	-0.32	-0.35	-1.17	8.59	8.59	1.78	17.63	2.88	26.79
Telecom	1,119.3	0.46	0.56	0.19	1.28	1.28	1.64	10.62	7.51	3.42
Industrials	1,015.3	0.16	0.34	0.01	11.83	11.83	1.12	6.97	2.78	3.46
Financial Services	1,367.2	-0.89	-1.20	-1.44	12.79	12.79	1.11	13.35	3.39	4.60
Real Estate	1,296.2	-0.54	-0.37	1.30	6.86	6.86	0.98	14.56	1.86	2.79
Basic Materials	781.2	-0.45	-0.14	0.14	4.72	4.72	1.35	11.10	10.01	0.44
Health Care	485.9	0.00	0.00	-0.06	0.78	0.78	1.76	12.16	1.71	0.24
Consumer Staples	726.5	-0.61	-1.26	1.57	10.31	10.31	1.58	18.95	1.70	0.22
Insurance	2,541.7	-0.27	-0.48	0.83	10.86	10.86	1.39	9.74	3.71	1.02
Consumer Discretionary	1,756.3	0.65	1.43	5.38	9.50	9.50				
Energy	1,032.6	0.10	-0.33	-0.16	8.81	8.81	0.79	10.47	4.88	0.22
Technology	1,920.6	-0.75	-0.75	-5.38	232.08	232.08	2.37			0.03
Utilities	444.7	-0.59	0.00	-0.59	-2.31	-2.31				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

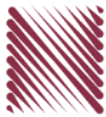
Oil prices rose in early Asian trading on Monday on concern over tighter global supply brought about by escalating conflict in the Middle East and between Russia and Ukraine, while a shrinking U.S. rig count added to upward price pressure. Brent crude futures had climbed 24 cents, or 0.3%, to \$85.67 a barrel

Kuwait Market

The market closed down by - 0.27% at 7,396.1 value traded 28.7 million KD, Premier market value reached 22.5 million KD down by - 0.34% at 8,091.6.

KSA Market

The market closed down – 1.09 % at 12,656.9



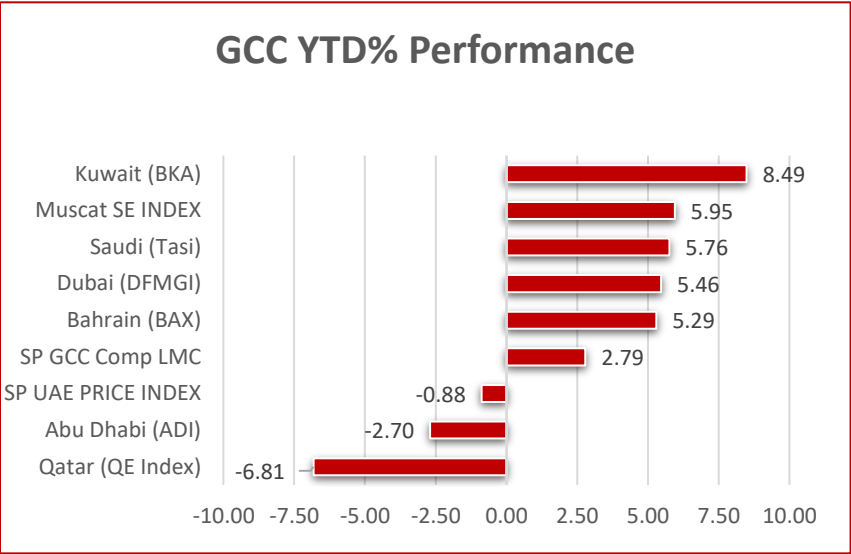
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.969	-0.41	-0.21	-1.12	8.39	8.39	1.78	14.26	3.61	7.68
KFH	0.803	-0.37	-0.50	-0.86	10.61	10.61	2.01	20.87	2.49	12.60
ZAIN	0.504	0.60	0.60	0.20	-0.59	-0.59	1.75	10.12	6.94	2.18
BOUBYAN BANK	0.616	0.00	0.33	-4.20	2.67	2.67	2.43	32.84	1.30	2.46
AGILITY	0.607	0.17	1.34	1.00	19.25	19.25	0.87	18.41	0.00	1.62
Saudi Arabia										
ARAMCO	30.85	-1.12	-1.12	-2.68	-6.52	-6.52	4.86	16.49	5.49	7,465.70
SABIC	77.10	-1.03	-0.64	-2.16	-7.66	-7.66	1.38	177.29	4.41	231.30
STC	39.45	-1.00	-0.50	-7.07	-2.35	-2.35	2.49	14.84	4.06	197.25
AL-RAJHI BANK	85.10	-3.51	-3.30	-4.38	-1.62	-1.62	3.19	21.54	2.70	340.40
NCB	39.35	-1.38	-2.24	-7.08	1.81	1.81	1.33	12.17	3.30	236.10
Abu Dhabi										
ETISALAT.AD	18.30	-0.11	-0.11	1.10	-6.82	-6.82	3.73	15.44	4.37	159.15
FAB.AD	13.74	1.48	1.48	0.73	-1.58	-1.58	1.21	9.63	5.17	151.79
EMIRATES NBD	17.65	0.00	0.00	-3.55	2.02	2.02	1.02	5.31	6.80	111.17
DB ISLAMIC DB	5.93	1.02	1.02	-7.92	3.67	3.67	0.96	6.72	7.59	43.01
EMAR.DU	8.38	0.00	0.00	3.20	5.81	5.81	0.95	6.24	5.97	73.89
Qatar										
QNB	14.210	-3.33	-3.66	-6.70	-14.04	-14.04	1.20	9.14	4.57	131.62
INDUSTREIS QAT	11.900	-1.57	-1.90	-7.75	-9.02	-9.02	1.80	15.25	6.55	71.69
QA ISLAMIC BK	19.400	-0.05	-0.26	-3.72	-9.77	-9.77	1.56	11.22	3.74	46.05
MASRAF AL RAYA	2.515	-0.20	-0.40	-0.59	-5.27	-5.27	0.95	16.64	3.98	22.46
MESAIEED PETRO	1.919	-0.67	-0.83	1.53	7.33	7.33	1.41	22.27	4.48	23.93
Oman										
BANK MUSCAT	0.278	0.72	0.36	6.11	5.30	5.30	0.89	11.02	5.58	2.09
OMANTEL	1.085	-0.46	-0.46	0.65	2.36	2.36	1.27	30.01	5.53	0.81
BANK DHOFAR	0.160	0.00	0.00	10.34	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.270	0.00	0.00	7.14	-3.57	-3.57	0.65	9.69	3.15	0.44
OMINVEST	0.384	0.26	-1.03	-1.54	-8.57	-8.57	0.84	10.51	3.91	0.26

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
13-March-24	24.54%	15.08%	0.06%	2.61%	5.58%	17.90%	12.77%	6.32%	5.32%
20-March-24	24.57%	14.95%	0.06%	2.55%	5.62%	18.03%	12.78%	6.30%	5.33%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is down today by -0.27 %The leading sector bottom performance indices today are Financial services -0.89 % Technology -0.75 % Consumer services -0.61 % respectively

KSA

Saudi Armco has a negative performance today -1.12 %, SABIC has a negative performance today by - 1.03%. STC has a negative performance today by - 1.0 %, Al Rajhi Bank has a negative performance today by - 3.51 %.

U.A.E

ETISALAT .AD has a negative performance today by - 0.11 %, FAB.AD has a positive performance today by + 1.48 %



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