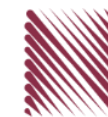


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 26th May 2024





Sunday, May 26, 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)	11,850.6	-1.21	-1.21	-4.39	-4.44	-0.98	2.25	19.97	3.27	10,457.82
Qatar (QE Index)	9,396.1	-1.74	-1.74	-3.40	-4.58	-13.25	1.08	10.68	5.06	469.46
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)	2,020.4	0.01	0.01	-0.43	-1.09	2.48	0.87	11.00	4.29	8.25
Muscat SE INDEX	4,805.7	0.06	0.06	0.45	3.67	6.46	0.82	10.29	5.68	6.64
SP GCC Comp LMC	173.8	-0.98	-0.98	-4.34	-6.24	-6.01	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.4	0.00	0.00	-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	7,129.2	-0.08	-0.08	1.11	-2.70	4.58	1.46	15.33	3.59	43.07
Kuwait Premier Index	7,782.7	-0.02	-0.02	1.19	-3.16	4.09	1.58	16.74	3.40	35.45
Kuwait Main Index	5,962.9	-0.35	-0.35	0.73	-0.38	7.06	1.04	10.47	4.52	7.62
Kuwait Sector										
Banking	1,763.9	0.02	0.02	1.91	-0.43	7.07	1.75	17.51	3.01	26.42
Telecom	1,001.9	-0.17	-0.17	-4.00	-5.93	-9.34	1.47	11.96	8.38	3.07
Industrials	743.9	-0.42	-0.42	-3.18	-28.84	-18.07	0.79	11.13	5.78	2.53
Financial Services	1,372.9	-0.34	-0.34	2.97	1.43	13.26	1.10	12.28	2.92	4.70
Real Estate	1,338.3	0.46	0.46	4.08	3.29	10.34	1.02	14.41	2.01	2.83
Basic Materials	840.2	0.99	0.99	-1.68	6.36	12.64	1.50	14.68	10.53	0.47
Health Care	445.9	0.00	0.00	-8.49	29.78	-7.52	1.59	10.95	1.93	
Consumer Staples	914.8	-1.58	-1.58	9.83	18.40	38.91	2.02	20.63	2.21	0.28
Insurance	2,498.8	0.30	0.30	0.47	-2.67	8.98	1.36	12.28	3.18	1.00
Consumer Discretionary	1,617.3	-1.77	-1.77	-3.75	-7.67	0.83				
Energy	1,082.2	-0.46	-0.46	1.92	3.76	14.03	0.89	10.20	5.87	0.23
Technology	1,709.6	-1.26	-1.26	-10.31	-10.31	195.60	2.14			0.02
Utilities	413.2	-0.63	-0.63	-5.42	-7.10	-9.25				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were in a holding pattern in early Asian trading on Monday as markets awaited an OPEC+ meeting on June 2 where producers are expected to discuss maintaining voluntary output cuts for the rest of the year. The Brent crude July contract inched up 11 cents to \$82.23 a barrel.

Kuwait Market

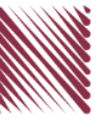
The market closed down by – 0.08% at 7,129.2 value traded 48.1 million KD, Premier market value reached 30.2 million KD down by – 0.02% at 7,782.7.

KSA Market

The market closed down by – 1.21% at 11,850.6.

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	0.46	0.46	0.23	-4.17	1.83	1.71	13.58	3.84	7.22
KFH	0.743	-0.13	-0.13	3.19	1.74	11.55	2.17	21.87	2.47	12.72
ZAIN	0.457	-0.44	-0.44	-6.35	-7.30	-9.86	1.59	10.38	7.66	1.98
BOUBAYAN BANK	0.580	-0.17	-0.17	-1.53	-0.52	2.47	2.44	30.95	1.30	2.44
AGILITY	0.299	-0.99	-0.99	-5.38	-17.83	5.57	0.81	8.78	6.69	0.80
Saudi Arabia										
ARAMCO	29.45	-1.67	-1.67	-2.16	-4.54	-10.76	4.68	16.24	6.36	7,126.90
SABIC	76.20	-0.78	-0.78	-9.82	-2.68	-8.74	1.37	199.88	4.33	228.60
STC	36.55	-0.81	-0.81	-2.92	-5.23	-7.11	2.26	13.56	4.38	182.75
AL-RAJHI BANK	78.00	-1.39	-1.39	-2.38	-5.22	-9.83	2.88	19.19	2.95	312.00
NCB	33.05	-2.65	-2.65	-12.10	-17.79	-14.49	1.09	10.20	5.30	198.30
Abu Dhabi										
ETISALAT.AD	15.40	-2.04	-4.35	-9.41	-16.12	-21.59	3.07	12.82	5.19	133.92
FAB.AD	11.84	-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	13.200	-2.22	-2.22	-4.83	-7.24	-20.15	1.17	8.34	4.92	121.95
INDUSTREIS QAT	11.590	-1.28	-1.28	-5.39	-3.01	-11.39	1.92	14.50	6.73	70.14
QA ISLAMIC BK	17.220	-1.37	-1.37	-5.90	-6.16	-19.91	1.42	9.84	4.21	40.70
MASRAF AL RAYA	2.408	-2.47	-2.47	-4.14	3.79	-9.30	0.93	15.70	4.15	22.40
MESAIEED PETRO	1.720	-2.27	-2.27	-10.37	-13.31	-3.80	1.33	21.44	5.00	21.61
Oman										
BANK MUSCAT	0.259	-0.38	-0.38	-1.15	-1.15	-1.89	0.85	10.11	5.98	1.94
OMANTEL	1.054	-0.47	-0.47	0.86	2.33	-0.57	1.29	11.90	5.69	0.79
BANK DHOFAR	0.155	1.97	1.97	-3.13	-3.13	-3.13	0.65	15.38	5.00	0.46
NAT BANK OF OMAN	0.277	0.00	0.00	7.78	6.54	-1.07	0.67	9.70	3.07	0.45
OMINVEST	0.378	0.00	0.00	-1.56	2.98	-4.37	0.80	8.21	5.29	0.25

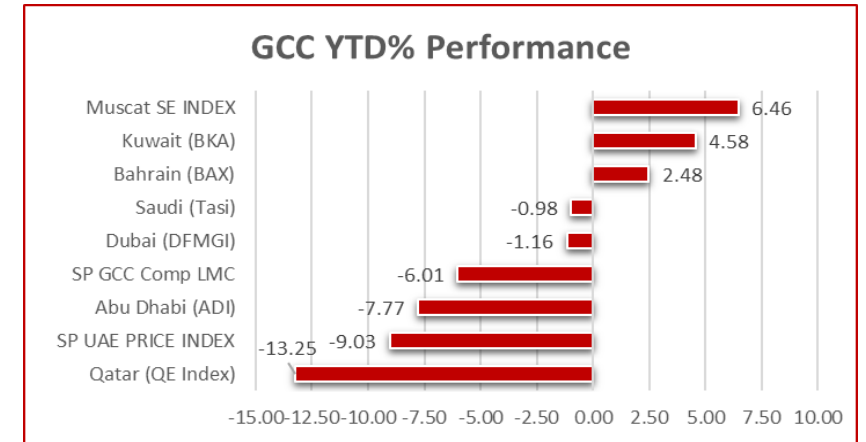
* GCC Markets performance at the latest close.

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 -0.08 %The leading sector bottom performance indices today are Consumer Disc -1.77 % Consumer services -1.58 % Technology -1.26 % respectively.

KSA

Saudi Armco have negative performance today by -1.67 %, SABIC have negative performance today by -0.78%, STC have negative performance today by -0.81 %, Al Rajhi Bank have negative performance today by -1.39 %.



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