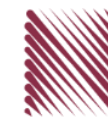


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 27th May 2024





Monday, May 27, 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)	11,831.2	-0.16	-1.37	-4.55	-4.60	-1.14	2.24	19.95	3.28	10,463.32
Qatar (QE Index)	9,332.4	-0.68	-2.40	-4.06	-5.23	-13.83	1.08	10.60	5.10	466.39
Dubai (DFMGI)	4,027.5	0.37	0.37	-3.09	-5.15	-0.80	1.35	8.04	6.06	585.61
Abu Dhabi (ADI)	8,830.7	-0.03	-0.03	-2.61	-4.31	-7.80	2.52	15.79	2.17	2,459.56
Bahrain (BAX)	2,025.3	0.24	0.25	-0.18	-0.85	2.73	0.88	11.04	4.28	8.30
Muscat SE INDEX	4,790.5	-0.32	-0.25	0.13	3.34	6.12	0.82	10.26	5.70	6.62
SP GCC Comp LMC	173.4	-0.25	-1.22	-4.57	-6.47	-6.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.3	-0.11	-0.11	-4.45	-6.97	-9.13				
Developed Markets										
MSCI World Index	3,468.1	0.17	0.17	4.93	0.88	9.43				
U.S. (S&P 500)	5,304.7	0.00	0.00	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	2,201.37
Japan (topix)	2,766.4	0.87	0.87	0.85	-0.08	16.90	1.44	15.36	2.09	974,173.54
Emerging Markets										
MSCI EM Index	1,090.3	0.68	0.68	4.24	4.52	6.50				
China (SSE Composite)	3,124.0	1.14	1.14	0.62	2.73	5.01	1.36	12.00		44,025.04
India (Sensex)	75,390.5	-0.03	-0.03	1.22	2.36	4.36	4.89	22.58	1.14	148,887.84
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,080.5	-0.68	-0.76	0.42	-3.37	3.86	1.46	15.30	3.59	43.03
Kuwait Premier Index	7,722.9	-0.77	-0.79	0.41	-3.90	3.29	1.58	16.74	3.40	35.44
Kuwait Main Index	5,947.1	-0.26	-0.61	0.46	-0.64	6.78	1.04	10.38	4.54	7.59
Kuwait Sector										
Banking	1,750.7	-0.75	-0.73	1.15	-1.18	6.27	1.75	17.51	3.01	26.42
Telecom	994.2	-0.77	-0.94	-4.75	-6.66	-10.04	1.47	11.94	8.39	3.06
Industrials	740.7	-0.42	-0.84	-3.59	-29.14	-18.42	0.78	11.09	5.81	2.52
Financial Services	1,366.2	-0.49	-0.83	2.46	0.93	12.70	1.10	12.31	2.93	4.68
Real Estate	1,326.3	-0.89	-0.44	3.15	2.37	9.35	1.02	14.46	2.00	2.84
Basic Materials	831.0	-1.10	-0.11	-2.76	5.20	11.40	1.51	14.83	10.43	0.47
Health Care	445.9	0.00	0.00	-8.49	29.78	-7.52	1.59	10.95	1.93	
Consumer Staples	907.6	-0.79	-2.36	8.97	17.46	37.81	1.99	20.30	2.25	0.28
Insurance	2,507.2	0.34	0.64	0.81	-2.34	9.35	1.36	12.33	3.17	1.01
Consumer Discretionary	1,605.4	-0.74	-2.50	-4.45	-8.35	0.09				
Energy	1,086.9	0.44	-0.02	2.36	4.21	14.53	0.89		5.90	0.23
Technology	1,709.6	0.00	-1.26	-10.31	-10.31	195.60	2.11			0.02
Utilities	410.5	-0.64	-1.27	-6.02	-7.69	-9.83				

* 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 steady in early Asian trading on Tuesday as investors awaited inflation data to assess future U.S. monetary policy and the production policy decisions from the OPEC+ meeting on June 2. The Brent crude July contract dropped 3 cents to \$83.07 a barrel.

Kuwait Market

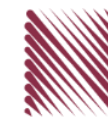
The market closed down by – 0.68% at 7,080.5 value traded 47.7 million KD, Premier market value reached 36.3 million KD down by – 0.77% at 7,722.9.

KSA Market

The market closed down by – 0.16% at 11,831.2.

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	0.860	-0.81	-0.35	-0.58	-4.95	1.01	1.69	13.47	3.88	7.19
KFH	0.736	-0.94	-1.08	2.22	0.78	10.50	2.15	21.66	2.49	12.60
ZAIN	0.452	-1.09	-1.53	-7.38	-8.32	-10.85	1.57	10.27	7.74	1.96
BOUBYAN BANK	0.581	0.17	0.00	-1.36	-0.35	2.64	2.44	31.00	1.30	2.44
AGILITY	0.295	-1.34	-2.32	-6.65	-18.93	4.16	0.79	8.66	6.78	0.80
Saudi Arabia										
ARAMCO	29.50	0.17	-1.50	-1.99	-4.38	-10.61	4.68	16.27	6.35	7,139.00
SABIC	76.30	0.13	-0.65	-9.70	-2.55	-8.62	1.37	200.14	4.33	228.90
STC	36.70	0.41	-0.41	-2.52	-4.84	-6.73	2.27	13.62	4.36	183.50
AL-RAJHI BANK	77.80	-0.26	-1.64	-2.63	-5.47	-10.06	2.87	19.14	2.96	311.20
NCB	33.70	1.97	-0.74	-10.37	-16.17	-12.81	1.11	10.40	5.19	202.20
Abu Dhabi										
ETISALAT.AD	15.40	0.00	0.00	-9.41	-16.12	-21.59	3.07	12.82	5.19	133.91
FAB.AD	11.84	0.00	0.00	-5.13	-10.44	-15.19	1.09	8.23	6.00	130.79
EMIRATES NBD	15.85	0.96	0.96	-6.76	-9.43	-8.38	0.92	4.62	7.57	101.05
DB ISLAMIC DB	5.67	3.09	3.09	1.98	-2.74	-0.87	0.96	6.32	7.94	41.05
EMAR.DU	7.69	-1.66	-1.66	-6.33	-5.88	-2.90	0.86	5.99	6.50	67.96
Qatar										
QNB	13.000	-1.52	-3.70	-6.27	-8.64	-21.36	1.15	8.21	5.00	120.11
INDUSTREIS QAT	11.600	0.09	-1.19	-5.31	-2.93	-11.31	1.92	14.52	6.72	70.20
QA ISLAMIC BK	16.980	-1.39	-2.75	-7.21	-7.47	-21.02	1.40	9.70	4.27	40.13
MASRAF AL RAYA	2.385	-0.96	-3.40	-5.06	2.80	-10.17	0.92	15.55	4.19	22.19
MESAEED PETRO	1.715	-0.29	-2.56	-10.63	-13.56	-4.08	1.33	21.38	5.01	21.55
Oman										
BANK MUSCAT	0.259	0.00	-0.38	-1.15	-1.15	-1.89	0.85	10.11	5.98	1.95
OMANTEL	1.056	0.19	-0.28	1.05	2.52	-0.38	1.29	11.92	5.68	0.79
BANK DHOFAR	0.155	0.00	1.97	-3.13	-3.13	-3.13	0.65	15.38	5.00	0.47
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	0.379	0.26	0.26	-1.30	3.25	-4.12	0.80	8.23	5.28	0.25

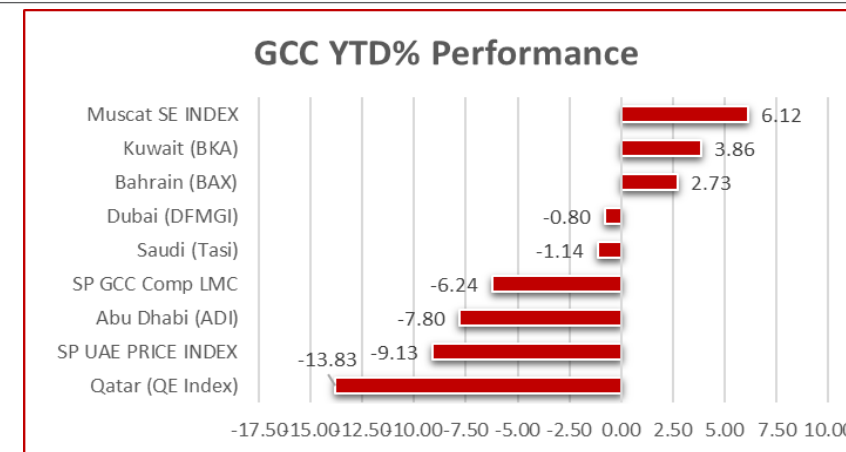
* GCC Markets performance at the latest close.

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 -0.68 %The leading sector bottom performance indices today are Basic materials -1.1 % Real estate -0.89 % Consumer services -0.79 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.17 %, SABIC have positive performance today by + 0.13%, STC has a positive performance today by + 0.41 %, Al Rajhi Bank have negative performance today by -0.26 %.



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