

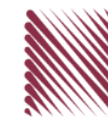


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 27, 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)	12,601.6	0.56	-0.26	6.82	5.30	5.30	2.40	21.50	2.76	11,229.33
Qatar (QE Index)	10,496.9	0.46	1.88	4.04	-3.08	-3.08	1.24	12.44	4.48	539.47
Dubai (DFMGI)	4,272.6	1.17	1.10	2.48	5.24	5.24	1.44	8.37	5.28	613.07
Abu Dhabi (ADI)	9,287.8	0.29	0.08	-2.32	-3.03	-3.03	2.51	17.18	2.14	2,561.76
Bahrain (BAX)	2,043.2	-0.54	-0.34	-1.16	3.64	3.64	0.81	10.74	4.38	7.49
Muscat SE INDEX	4,577.8	-0.35	0.15	0.35	1.41	1.41	0.78	10.25	4.85	6.39
SP GCC Comp LMC	191.0	0.60	0.22	4.12	3.25	3.25	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.0	0.84	0.91	-1.11	-1.32	-1.32				
Developed Markets										
MSCI World Index	3,331.9	0.18	-0.06	3.95	5.13	5.13				
U.S. (S&P 500)	5,078.2	0.17	-0.21	4.80	6.46	6.46	4.28	25.19	1.79	44,905.40
U.K. (FTSE 100)	7,683.0	-0.02	-0.30	0.69	-0.65	-0.65	1.64	12.39	3.88	2,033.34
Japan (topix)	2,678.5	-0.13	0.54	4.85	13.04	13.04	1.58	14.96	2.03	961,348.57
Emerging Markets										
MSCI EM Index	1,027.7	0.36	-0.05	5.32	0.39	0.39				
China (SSE Composite)	3,015.5	1.29	0.35	8.14	1.36	1.36	1.36	12.00		44,025.04
India (Sensex)	73,095.2	0.42	-0.07	1.87	1.18	1.18	4.69	23.17	1.13	145,816.23

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,433.3	0.25	0.25	2.27	9.04	9.04	1.55		3.15	48.06
Kuwait Premier Index	8,157.7	0.36	0.36	2.49	9.10	9.10	1.70	17.56	3.03	40.56
Kuwait Main Index	6,054.5	-0.32	-0.32	1.36	8.70	8.70	1.05		3.80	7.50
Kuwait Sector										
Banking	1,808.8	0.55	0.55	2.99	9.79	9.79	1.82	17.87	2.75	30.49
Telecom	1,133.1	0.45	0.45	-4.82	2.53	2.53	1.68	10.72	6.38	3.48
Industrials	1,021.0	-0.59	-0.59	3.64	12.45	12.45	1.14	15.74	2.79	3.53
Financial Services	1,380.4	-0.60	-0.60	1.62	13.87	13.87	1.10	13.75	3.40	4.40
Real Estate	1,267.2	-0.16	-0.16	3.57	4.48	4.48	0.97	14.54	1.81	2.72
Basic Materials	788.9	-0.65	-0.65	3.83	5.76	5.76	1.37	11.42	9.91	0.45
Health Care	472.8	0.00	0.00	-2.01	-1.95	-1.95	1.71	11.83	1.76	0.23
Consumer Staples	705.2	0.23	0.23	0.00	7.08	7.08	1.61	16.69	1.75	0.21
Insurance	2,450.0	0.42	0.42	3.76	6.86	6.86	1.36	8.32	3.81	0.99
Consumer Discretionary	1,640.7	-0.69	-0.69	3.66	2.29	2.29				
Energy	1,068.8	1.56	1.56	4.49	12.63	12.63	0.82	10.78	4.71	0.22
Technology	2,044.3	1.81	1.81	1.44	253.46	253.46	2.52			0.03
Utilities	444.7	0.59	0.59	-0.59	-2.31	-2.31				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

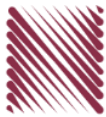
Crude oil futures rose Tuesday amid uncertainty about the prospects for a cease-fire in the Israel-Hamas war and as some investors expect OPEC+ will extend its production cuts beyond the first quarter. Brent April futures rose \$1.12, or 1.36%, to settle at \$83.65 a barrel.

Kuwait Market

The market closed up by + 0.25 % at 7,433.3 value traded 51.9 million KD, Premier market value reached 38.7 million KD up by + 0.36 % at 8,157.7

KSA Market

The market closed up by + 0.56 % at 12,601.6

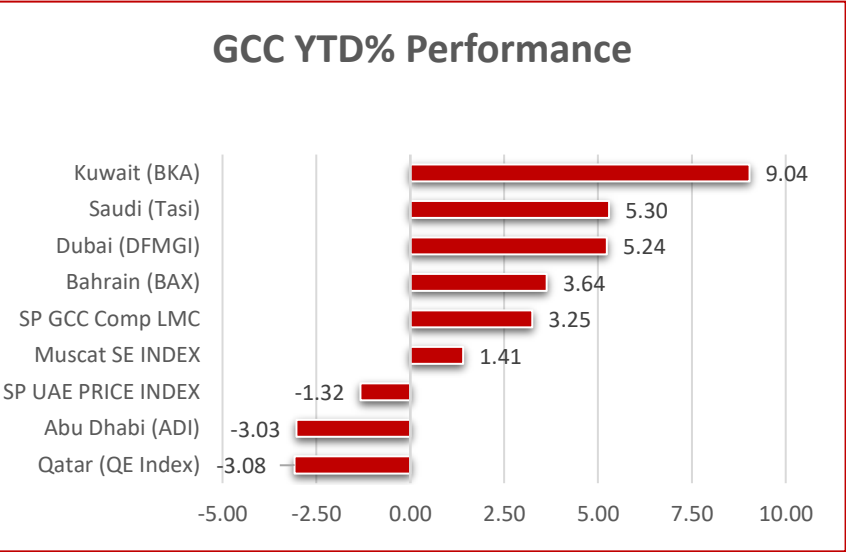


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.983	0.82	0.82	0.31	9.96	9.96	1.80	14.47	3.56	7.80
KFH	0.806	0.62	0.62	4.40	11.02	11.02	2.02	20.95	2.48	12.68
ZAIN	0.514	0.39	0.39	-2.28	1.38	1.38	1.78	10.28	6.81	2.23
BOUBYAN BANK	0.647	0.94	0.94	5.37	7.83	7.83	2.55	34.49	0.87	2.56
AGILITY	0.613	-1.45	-1.45	5.69	20.43	20.43	0.88	18.59	0.00	1.64
Saudi Arabia										
ARAMCO	31.95	0.47	-0.16	4.41	-3.18	-3.18	5.00	16.26	4.74	7,731.69
SABIC	79.90	1.40	1.01	2.57	-4.31	-4.31	1.38	77.94	4.26	239.69
STC	41.70	0.72	-0.60	2.21	3.22	3.22	2.64	15.13	3.84	208.49
AL-RAJHI BANK	89.90	0.45	-0.77	7.02	3.93	3.93	3.37	22.76	1.97	359.59
NCB	42.30	-0.12	-0.82	4.19	9.44	9.44	1.43	13.09	3.07	253.79
Abu Dhabi										
ETISALAT.AD	18.58	1.42	0.65	-3.13	-5.40	-5.40	3.79	15.68	4.31	161.59
FAB.AD	13.88	1.46	0.58	-5.19	-0.57	-0.57	1.22	9.73	5.12	153.56
EMIRATES NBD	18.40	3.95	4.25	3.95	6.36	6.36	1.06	5.54	6.52	116.23
DB ISLAMIC DB	6.44	1.42	0.94	1.90	12.59	12.59	1.04	7.30	6.99	46.63
EMAR.DU	8.09	-0.12	0.75	8.88	2.15	2.15	0.96	7.46	3.09	71.42
Qatar										
QNB	15.090	0.60	0.67	-2.71	-8.71	-8.71	1.28	9.70	4.31	138.64
INDUSTREIS QAT	12.850	0.47	3.38	7.08	-1.76	-1.76	1.95	16.47	6.07	77.80
QA ISLAMIC BK	20.300	1.05	0.50	4.10	-5.58	-5.58	1.63	11.74	3.57	47.54
MASRAF AL RAYA	2.521	1.69	2.81	7.28	-5.05	-5.05	0.95	16.68	3.97	23.37
MESAIEED PETRO	1.843	1.43	4.01	9.70	3.08	3.08	1.36	21.39	4.67	23.22
Oman										
BANK MUSCAT	0.264	0.38	-0.38	-1.86	0.00	0.00	0.84	10.46	5.68	1.98
OMANTEL	1.083	-0.18	0.74	0.28	2.17	2.17	1.27	29.96	3.00	0.81
BANK DHOFAR	0.150	0.00	0.00	0.00	-6.25	-6.25	0.61	16.06	5.17	0.43
NAT BANK OF OMAN	0.256	-1.54	0.79	-3.76	-8.57	-8.57	0.62	9.19	3.32	0.42
OMINVEST	0.410	0.00	0.00	-8.89	-2.38	-2.38	0.90	11.22	3.66	0.27
Foreign Holding										
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA	
14-February-24	24.44%	14.80%	0.06%	2.69%	5.46%	17.90%	13.20%	6.26%	5.21%	
21-February-24	24.5%	14.75%	0.06%	2.71%	5.46%	17.92%	12.63%	6.27%	5.22%	

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.25 % The leading sector top performance indices today are Technology + 1.81 % Energy + 1.56 % Utilities + 0.59 % respectively

KSA

Saudi Armco had a positive performance today by + 0.47 %, SABIC had a positive performance today by + 1.40 %, STC had a positive performance today by + 0.72 %, Al Rajhi Bank had a positive performance today by + 0.45 %

U.A.E

ETISALAT.AD had a positive performance today by + 1.42 %, FAB.AD had a positive performance today by + 1.46 %



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