



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday , March 27, 2024

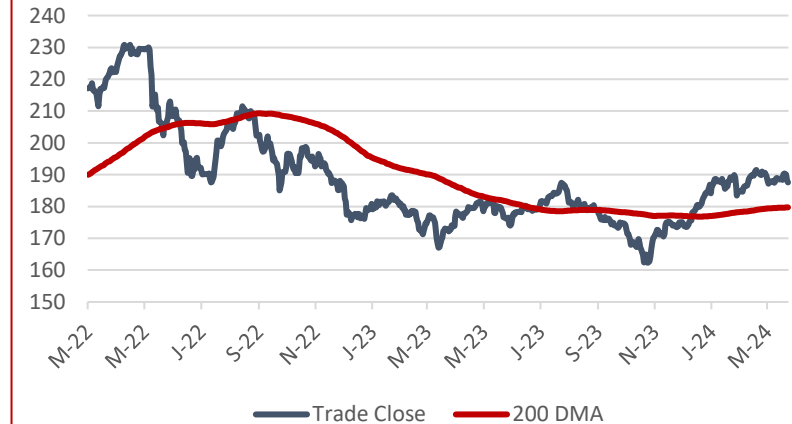




Wednesday, March 27, 2024

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,608.0	0.18	-1.77	-0.18	5.35	5.35	2.42	21.80	2.95	10,984.15
Qatar (QE Index)	9,958.0	-0.68	-2.48	-4.93	-8.06	-8.06	1.18	11.50	4.74	510.13
Dubai (DFMGI)	4,231.8	-0.34	-1.13	-1.79	4.24	4.24	1.37	8.33	5.72	605.06
Abu Dhabi (ADI)	9,273.2	-0.49	-0.52	0.20	-3.18	-3.18	2.64	17.45	2.07	2,652.64
Bahrain (BAX)	2,056.0	-0.60	0.26	2.52	4.28	4.28	0.89	10.88	4.20	8.42
Muscat SE INDEX	4,710.8	-0.94	-1.68	3.42	4.36	4.36	0.79	10.46	5.52	6.55
SP GCC Comp LMC	187.2	-0.21	-1.68	-1.73	1.20	1.20	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.9	-0.82	-1.23	-0.42	-2.10	-2.10				
Developed Markets										
MSCI World Index	3,437.0	0.66	0.26	2.99	8.45	8.45				
U.S. (S&P 500)	5,248.5	0.86	0.27	2.99	10.04	10.04	4.39	26.10	1.72	46,469.84
U.K. (FTSE 100)	7,932.0	0.01	0.01	3.96	2.57	2.57	1.70	13.06	3.75	2,099.07
Japan (topix)	2,750.8	-1.73	-2.22	2.81	16.24	16.24	1.65	15.62	1.94	1,001,243.22
Emerging Markets										
MSCI EM Index	1,036.7	-0.32	-0.25	1.55	1.27	1.27				
China (SSE Composite)	3,010.7	0.59	-1.23	-0.15	1.20	1.20	1.36	12.00		44,025.04
India (Sensex)	72,996.3	0.73	0.23	0.68	1.05	1.05	4.73	23.29	1.13	144,916.13
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,367.3	-0.44	-0.65	-0.99	8.07	8.07	1.51	15.42	3.40	44.44
Kuwait Premier Index	8,073.6	-0.27	-0.54	-1.05	7.98	7.98	1.66	17.11	3.15	36.79
Kuwait Main Index	6,044.9	-1.28	-1.24	-0.68	8.53	8.53	1.04	10.00	4.67	7.65
Kuwait Sector										
Banking	1,785.9	-0.25	-0.52	-1.34	8.40	8.40	1.77	17.60	2.97	26.75
Telecom	1,082.1	-2.96	-2.78	-3.15	-2.09	-2.09	1.58	10.26	7.77	3.31
Industrials	1,027.9	0.95	1.58	1.25	13.22	13.22	1.14	16.06	2.78	3.51
Financial Services	1,361.0	-0.24	-1.65	-1.89	12.27	12.27	1.10	13.28	3.41	4.56
Real Estate	1,281.0	-1.21	-1.54	0.11	5.61	5.61	0.96	14.34	1.89	2.75
Basic Materials	776.0	-0.23	-0.81	-0.53	4.03	4.03	1.34	10.85	10.07	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	736.4	-0.14	0.08	2.96	11.81	11.81	1.60	19.21	1.67	0.22
Insurance	2,516.9	-0.99	-1.45	-0.15	9.78	9.78	1.40	9.65	3.75	1.01
Consumer Discretionary	1,759.8	-0.50	1.63	5.58	9.72	9.72				
Energy	1,063.2	2.81	2.62	2.80	12.04	12.04	0.81	10.80	4.74	0.22
Technology	1,906.1	-0.76	-1.50	-6.09	229.56	229.56	2.35			0.03
Utilities	444.7	0.00	0.00	-0.59	-2.31	-2.31				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell for a second day Wednesday on surging U.S. stockpiles and signs that OPEC+ is unlikely to change its output policy at a technical meeting next week. Brent crude futures for May dropped 97 cents, or 1.12%, to \$85.28 a barrel.

Kuwait Market

The market closed down by - 0.44% at 7,367.3 value traded 52.1 million KD, Premier market value reached 45.9 million KD down by - 0.27% at 8,073.6.

KSA Market

The market closed up + 0.18 % at 12,608.0

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	0.964	-0.10	-0.72	-1.63	7.83	7.83	1.77	14.19	3.63	7.65
KFH	0.803	-0.37	-0.50	-0.86	10.61	10.61	2.01	20.87	2.49	12.62
ZAIN	0.495	-1.00	-1.20	-1.59	-2.37	-2.37	1.72	9.94	7.07	2.14
BOUBYAN BANK	0.616	0.16	0.33	-4.20	2.67	2.67	2.43	32.84	1.30	2.45
AGILITY	0.620	2.31	3.51	3.16	21.81	21.81	0.89	18.80	0.00	1.71
Saudi Arabia										
ARAMCO	30.80	-0.16	-1.28	-2.84	-6.67	-6.67	4.86	16.46	5.50	7,453.80
SABIC	77.00	0.00	-0.77	-2.28	-7.78	-7.78	1.38	177.06	4.42	231.01
STC	39.75	0.00	0.25	-6.36	-1.61	-1.61	2.51	14.95	4.03	198.76
AL-RAJHI BANK	84.30	-0.24	-4.20	-5.28	-2.54	-2.54	3.16	21.34	2.73	337.21
NCB	38.90	0.00	-3.35	-8.15	0.65	0.65	1.31	12.04	3.34	233.41
Abu Dhabi										
ETISALAT.AD	18.26	-0.22	-0.33	0.88	-7.03	-7.03	3.72	15.41	4.38	158.80
FAB.AD	13.48	-1.75	-0.44	-1.17	-3.44	-3.44	1.19	9.45	5.27	148.92
EMIRATES NBD	17.25	-1.43	-2.27	-5.74	-0.29	-0.29	0.99	5.19	6.96	108.96
DB ISLAMIC DB	5.83	-0.51	-0.68	-9.47	1.92	1.92	0.95	6.61	7.72	42.29
EMAR.DU	8.19	-0.73	-2.27	0.86	3.41	3.41	0.93	6.10	6.11	72.65
Qatar										
QNB	14.210	-0.63	-3.66	-6.70	-14.04	-14.04	1.20	9.14	4.57	131.34
INDUSTREIS QAT	11.990	0.08	-1.15	-7.05	-8.33	-8.33	1.82	15.37	6.51	72.54
QA ISLAMIC BK	19.050	-1.85	-2.06	-5.46	-11.40	-11.40	1.53	11.02	3.81	44.97
MASRAF AL RAYA	2.360	-0.88	-6.53	-6.72	-11.11	-11.11	0.89	15.61	4.24	21.96
MESAIEED PETRO	1.961	2.14	1.34	3.76	9.68	9.68	1.44	22.76	4.39	24.25
Oman										
BANK MUSCAT	0.264	-4.69	-4.69	0.76	0.00	0.00	0.84	10.46	5.87	1.97
OMANTEL	1.080	0.00	-0.92	0.19	1.89	1.89	1.27	29.88	5.56	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	0.267	0.00	-1.11	5.95	-4.64	-4.64	0.64	9.58	3.18	0.43
OMINVEST	0.382	0.00	-1.55	-2.05	-9.05	-9.05	0.84	10.46	3.93	0.26

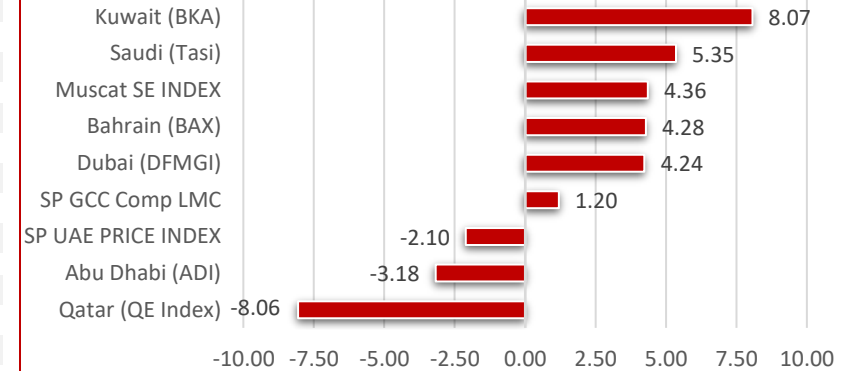
Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
13-March-24	24.54%	15.08%	0.06%	2.61%	5.58%	17.90%	12.77%	6.32%	5.32%
20-March-24	24.57%	14.95%	0.06%	2.55%	5.62%	18.03%	12.78%	6.30%	5.33%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.05 %The leading sector best performance indices today are Consumer services 1.51 % Consumer Disc 0.7 % Industrials 0.28 % respectively

KSA

Saudi Armco has a negative performance today by - 0.16%, SABIC has a flat performance today. STC has a flat performance today, Al Rajhi Bank has a negative performance today by – 0.24 %.

U.A.E

ETISALAT .AD has a negative performance today by - 0.22 % , FAB.AD has a negative performance today by – 1.75 %



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