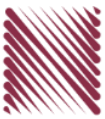


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, 28<sup>th</sup> May 2024





Tuesday, May 28, 2024

| * Market Watch           | Close Price | DTD   | WTD   | MTD    | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|--------|--------|--------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |        |        |        |      |       |                |                       |
| Saudi (Tasi)             | 11,659.9    | -1.45 | -2.80 | -5.93  | -5.98  | -2.57  | 2.21 | 19.65 | 3.32           | 10,347.04             |
| Qatar (QE Index)         | 9,376.9     | 0.48  | -1.94 | -3.60  | -4.78  | -13.42 | 1.08 | 10.65 | 5.08           | 467.82                |
| Dubai (DFMGI)            | 3,986.9     | -1.01 | -0.64 | -4.06  | -6.11  | -1.80  | 1.34 | 7.98  | 6.10           | 580.51                |
| Abu Dhabi (ADI)          | 8,742.2     | -1.00 | -1.03 | -3.59  | -5.27  | -8.72  | 2.51 | 15.64 | 2.20           | 2,429.81              |
| Bahrain (BAX)            | 2,021.6     | -0.18 | 0.07  | -0.37  | -1.03  | 2.54   | 0.88 | 11.03 | 4.28           | 8.32                  |
| Muscat SE INDEX          | 4,829.1     | 0.81  | 0.55  | 0.94   | 4.17   | 6.98   | 0.83 | 10.32 | 5.67           | 6.66                  |
| SP GCC Comp LMC          | 171.6       | -1.06 | -2.26 | -5.58  | -7.46  | -7.24  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 123.5       | -1.41 | -1.52 | -5.79  | -8.28  | -10.41 |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |        |        |        |      |       |                |                       |
| MSCI World Index         | 3,464.6     | -0.10 | 0.07  | 4.82   | 0.78   | 9.32   |      |       |                |                       |
| U.S. (S&P 500)           | 5,306.0     | 0.02  | 0.02  | 5.37   | 0.98   | 11.24  | 4.41 | 25.89 | 1.65           | 46,876.19             |
| U.K. (FTSE 100)          | 8,254.2     | -0.76 | -0.76 | 1.35   | 3.79   | 6.74   | 1.77 | 14.83 | 3.69           | 2,185.24              |
| Japan (topix)            | 2,768.5     | 0.08  | 0.95  | 0.92   | 0.00   | 16.99  | 1.44 | 15.37 | 2.09           | 974,352.35            |
| <b>Emerging Markets</b>  |             |       |       |        |        |        |      |       |                |                       |
| MSCI EM Index            | 1,088.0     | -0.21 | 0.46  | 4.02   | 4.30   | 6.28   |      |       |                |                       |
| China (SSE Composite)    | 3,109.6     | -0.46 | 0.67  | 0.15   | 2.25   | 4.53   | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 75,170.5    | -0.29 | -0.32 | 0.92   | 2.06   | 4.06   | 4.88 | 22.51 | 1.17           | 148,438.07            |
| <b>Kuwait</b>            |             |       |       |        |        |        |      |       |                |                       |
| Kuwait All Share Index   | 7,058.3     | -0.31 | -1.07 | 0.10   | -3.67  | 3.54   | 1.45 | 15.19 | 3.62           | 42.75                 |
| Kuwait Premier Index     | 7,692.6     | -0.39 | -1.18 | 0.01   | -4.28  | 2.88   | 1.57 | 16.61 | 3.43           | 35.17                 |
| Kuwait Main Index        | 5,951.4     | 0.07  | -0.54 | 0.53   | -0.57  | 6.85   | 1.04 | 10.35 | 4.55           | 7.58                  |
| <b>Kuwait Sector</b>     |             |       |       |        |        |        |      |       |                |                       |
| Banking                  | 1,746.8     | -0.22 | -0.95 | 0.93   | -1.40  | 6.03   | 1.74 | 17.38 | 3.03           | 26.22                 |
| Telecom                  | 987.4       | -0.68 | -1.61 | -5.40  | -7.29  | -10.65 | 1.46 | 11.85 | 8.45           | 3.04                  |
| Industrials              | 734.9       | -0.79 | -1.62 | -4.35  | -29.70 | -19.06 | 0.78 | 11.03 | 5.83           | 2.51                  |
| Financial Services       | 1,361.6     | -0.33 | -1.16 | 2.12   | 0.60   | 12.32  | 1.09 | 12.23 | 2.94           | 4.66                  |
| Real Estate              | 1,323.1     | -0.24 | -0.68 | 2.90   | 2.12   | 9.09   | 1.02 | 14.33 | 2.02           | 2.82                  |
| Basic Materials          | 832.7       | 0.20  | 0.09  | -2.56  | 5.41   | 11.63  | 1.49 | 14.66 | 10.54          | 0.47                  |
| Health Care              | 445.9       | 0.00  | 0.00  | -8.49  | 29.78  | -7.52  | 1.59 | 10.95 | 1.93           |                       |
| Consumer Staples         | 891.5       | -1.77 | -4.09 | 7.03   | 15.38  | 35.37  | 1.97 | 20.14 | 2.26           | 0.28                  |
| Insurance                | 2,481.7     | -1.02 | -0.39 | -0.22  | -3.34  | 8.24   | 1.37 | 12.37 | 3.16           | 1.01                  |
| Consumer Discretionary   | 1,606.3     | 0.06  | -2.44 | -4.40  | -8.30  | 0.15   |      |       |                |                       |
| Energy                   | 1,085.4     | -0.14 | -0.16 | 2.22   | 4.07   | 14.37  | 0.89 | 7.81  | 5.86           | 0.23                  |
| Technology               | 1,702.4     | -0.43 | -1.68 | -10.69 | -10.69 | 194.34 | 2.11 |       |                | 0.02                  |
| Utilities                | 413.2       | 0.64  | -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 rose on Wednesday on expectations major producers will maintain production cuts at a meeting this Sunday at the same time fuel consumption should begin rising with the start of the peak summer demand season. Brent crude futures for July delivery rose 27 cents, or 0.3%, to \$84.49 a barrel.

#### Kuwait Market

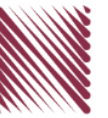
The market closed down by – 0.31% at 7,058.3 value traded 47.0 million KD, Premier market value reached 35.7 million KD down by – 0.39% at 7,692.6.

#### KSA Market

The market closed down by – 1.45% at 11,659.9.

# 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) |
|------------------------|-------------|-------|-------|--------|--------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |        |        |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |        |        |        |      |        |                |                       |
| NBK                    | 0.856       | -0.47 | -0.81 | -1.04  | -5.39  | 0.54   | 1.69 | 12.93  | 3.89           | 7.13                  |
| KFH                    | 0.734       | -0.27 | -1.34 | 1.94   | 0.51   | 10.20  | 2.15 | 21.60  | 2.50           | 12.57                 |
| ZAIN                   | 0.450       | -0.44 | -1.96 | -7.79  | -8.72  | -11.24 | 1.57 | 10.22  | 7.78           | 1.95                  |
| BOUBYAN BANK           | 0.581       | 0.00  | 0.00  | -1.36  | -0.35  | 2.64   | 2.44 | 31.00  | 1.30           | 2.44                  |
| AGILITY                | 0.292       | -1.02 | -3.31 | -7.59  | -19.76 | 3.10   | 0.79 | 8.57   | 6.85           | 0.78                  |
| <b>Saudi Arabia</b>    |             |       |       |        |        |        |      |        |                |                       |
| ARAMCO                 | 29.25       | -0.85 | -2.34 | -2.82  | -5.19  | -11.36 | 4.64 | 16.13  | 6.41           | 7,078.69              |
| SABIC                  | 75.10       | -1.57 | -2.21 | -11.12 | -4.09  | -10.06 | 1.35 | 196.99 | 4.39           | 225.31                |
| STC                    | 36.40       | -0.82 | -1.22 | -3.32  | -5.62  | -7.49  | 2.26 | 13.51  | 4.40           | 182.00                |
| AL-RAJHI BANK          | 77.60       | -0.26 | -1.90 | -2.88  | -5.71  | -10.29 | 2.87 | 19.09  | 2.96           | 310.41                |
| NCB                    | 33.00       | -2.08 | -2.80 | -12.23 | -17.91 | -14.62 | 1.09 | 10.19  | 5.30           | 198.01                |
| <b>Abu Dhabi</b>       |             |       |       |        |        |        |      |        |                |                       |
| ETISALAT.AD            | 15.00       | -2.60 | -2.60 | -11.76 | -18.30 | -23.63 | 2.99 | 12.49  | 5.33           | 130.43                |
| FAB.AD                 | 11.58       | -2.20 | -2.20 | -7.21  | -12.41 | -17.05 | 1.07 | 8.05   | 6.13           | 127.91                |
| EMIRATES NBD           | 15.60       | -1.58 | -0.64 | -8.24  | -10.86 | -9.83  | 0.91 | 4.55   | 7.69           | 98.53                 |
| DB ISLAMIC DB          | 5.57        | -1.76 | 1.27  | 0.18   | -4.46  | -2.62  | 0.94 | 6.20   | 8.08           | 40.33                 |
| EMAR.DU                | 7.74        | 0.65  | -1.02 | -5.72  | -5.26  | -2.27  | 0.86 | 6.03   | 6.46           | 68.40                 |
| <b>Qatar</b>           |             |       |       |        |        |        |      |        |                |                       |
| QNB                    | 13.000      | 0.00  | -3.70 | -6.27  | -8.64  | -21.36 | 1.15 | 8.21   | 5.00           | 120.10                |
| INDUSTREIS QAT         | 11.620      | 0.17  | -1.02 | -5.14  | -2.76  | -11.16 | 1.92 | 14.54  | 6.71           | 70.32                 |
| QA ISLAMIC BK          | 17.520      | 3.18  | 0.34  | -4.26  | -4.52  | -18.51 | 1.45 | 10.01  | 4.14           | 41.41                 |
| MASRAF AL RAYA         | 2.403       | 0.75  | -2.67 | -4.34  | 3.58   | -9.49  | 0.93 | 15.66  | 4.16           | 22.35                 |
| MESAEED PETRO          | 1.720       | 0.29  | -2.27 | -10.37 | -13.31 | -3.80  | 1.33 | 21.44  | 5.00           | 21.61                 |
| <b>Oman</b>            |             |       |       |        |        |        |      |        |                |                       |
| BANK MUSCAT            | 0.258       | -0.39 | -0.77 | -1.53  | -1.53  | -2.27  | 0.84 | 10.07  | 6.01           | 1.94                  |
| OMANTEL                | 1.056       | 0.00  | -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           | 0.46                  |
| NAT BANK OF OMAN       | 0.275       | -0.72 | -0.72 | 7.00   | 5.77   | -1.79  | 0.66 | 9.63   | 3.09           | 0.45                  |
| OMINVEST               | 0.390       | 2.90  | 3.17  | 1.56   | 6.25   | -1.34  | 0.82 | 8.47   | 5.13           | 0.26                  |

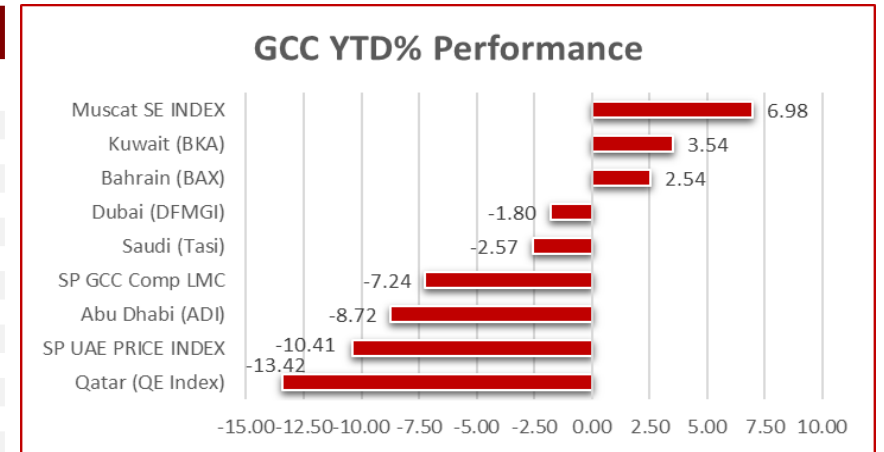
\* GCC Markets performance at the latest close.

| 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 -0.31 %The leading sector bottom performance indices today are Consumer services -1.77 % Insurance -1.02 % Industrials -0.79 % respectively.

#### KSA

Saudi Armco have negative performance today by -0.85 %, SABIC have negative performance today by -1.5%, STC have negative performance today by -0.82 %, Al Rajhi Bank have negative performance today by -0.26 %.



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