



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 28th April 2024





Sunday, April 28, 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)	12,231.5	-0.19	-0.19	-1.37	-1.37	2.21	2.33	20.76	3.14	10,744.28
Qatar (QE Index)	9,667.2	0.31	0.31	-1.83	-1.83	-10.74	1.12	11.03	4.91	486.60
Dubai (DFMGI)	4,148.2	-0.52	-0.63	-2.31	-2.31	2.18	1.36	8.04	5.86	596.07
Abu Dhabi (ADI)	9,042.3	0.01	-0.92	-2.01	-2.01	-5.59	2.57	16.85	2.11	2,534.34
Bahrain (BAX)	2,024.1	0.36	0.36	-0.91	-0.91	2.67	0.87	10.66	4.26	8.24
Muscat SE INDEX	4,760.7	1.00	1.00	2.70	2.70	5.46	0.81	10.60	5.48	6.61
SP GCC Comp LMC	180.0	0.26	0.26	-2.92	-2.92	-2.69	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.1	0.00	0.00	-3.34	-3.34	-5.58				
Developed Markets										
MSCI World Index	3,335.1	0.86	2.44	-2.99	-2.99	5.23				
U.S. (S&P 500)	5,100.0	1.02	2.67	-2.94	-2.94	6.92	4.22	25.22	1.72	45,141.62
U.K. (FTSE 100)	8,139.8	0.75	3.09	2.35	2.35	5.26	1.73	13.43	3.67	2,152.78
Japan (topix)	2,686.5	0.86	2.29	-2.97	-2.97	13.53	1.56	14.89	2.05	954,864.17
Emerging Markets										
MSCI EM Index	1,041.5	1.26	3.72	-0.16	-0.16	1.74				
China (SSE Composite)	3,088.6	1.17	0.76	1.56	1.56	3.82	1.36	12.00		44,025.04
India (Sensex)	73,730.2	-0.82	0.88	0.11	0.11	2.06	4.78	22.57	1.14	145,969.94
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,022.1	-0.06	-0.06	-4.16	-4.16	3.00	1.43	14.96	3.59	42.32
Kuwait Premier Index	7,653.5	-0.13	-0.13	-4.77	-4.77	2.36	1.56	16.44	3.40	34.89
Kuwait Main Index	5,919.6	0.28	0.28	-1.10	-1.10	6.28	1.03	10.05	4.52	7.43
Kuwait Sector										
Banking	1,721.6	-0.36	-0.36	-2.82	-2.82	4.50	1.72	17.26	3.07	25.88
Telecom	1,044.9	0.77	0.77	-1.90	-1.90	-5.45	1.52	9.84	8.11	3.17
Industrials	764.9	1.36	1.36	-26.83	-26.83	-15.75	0.80	11.60	4.65	2.56
Financial Services	1,331.5	-0.24	-0.24	-1.63	-1.63	9.84	1.06	13.21	3.29	4.47
Real Estate	1,281.3	0.04	0.04	-1.11	-1.11	5.64	0.98	13.86	2.07	2.72
Basic Materials	847.4	0.68	0.68	7.27	7.27	13.60	1.44	11.75	9.29	0.48
Health Care	473.8	5.25	5.25	37.89	37.89	-1.74	1.60	11.30	1.91	
Consumer Staples	839.1	-0.12	-0.12	8.60	8.60	27.41	1.82	21.92	1.47	0.26
Insurance	2,553.1	-0.15	-0.15	-0.56	-0.56	11.35	1.39	13.48	3.32	1.03
Consumer Discretionary	1,655.8	0.26	0.26	-5.47	-5.47	3.24				
Energy	1,052.3	1.45	1.45	0.90	0.90	10.89	0.85	9.99	4.86	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	407.9	0.00	0.00	-8.29	-8.29	-10.41				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trading on Monday, reversing gains from Friday as U.S. inflation data further dimmed the prospects of interest rate cuts anytime soon and boosted the dollar, which hurts oil demand. Brent crude futures fell 75 cents, or 0.84%, to \$88.75 a barrel.

Kuwait Market

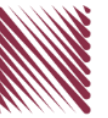
The market closed down by -0.06% at 7,022.1 value traded 51.9 million KD, Premier market value reached 45.6 million KD down by - 0.13% at 7,653.5.

KSA Market

The market closed down by - 0.19% at 12,231.5.

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	0.865	0.23	0.23	-4.39	-4.39	1.59	1.70	13.55	3.85	7.20
KFH	0.717	-0.83	-0.83	-1.82	-1.82	7.65	2.10	21.10	2.56	12.26
ZAIN	0.492	1.44	1.44	-0.20	-0.20	-2.96	1.71	9.88	7.11	2.13
BOUBAYAN BANK	0.580	-0.51	-0.51	-0.52	-0.52	2.47	2.44	30.95	1.30	2.43
AGILITY	0.317	4.62	4.62	-12.89	-12.89	11.93	0.46	9.68	3.15	0.85
Saudi Arabia										
ARAMCO	30.15	0.17	0.17	-2.27	-2.27	-8.64	4.75	16.11	5.62	7,296.11
SABIC	82.00	4.06	4.06	4.73	4.73	-1.80	1.47	188.55	4.15	245.99
STC	37.90	1.47	1.47	-1.73	-1.73	-3.68	2.39	14.25	4.22	189.49
AL-RAJHI BANK	78.60	1.42	1.42	-4.50	-4.50	-9.13	2.94	19.90	2.93	314.39
NCB	37.45	1.35	1.35	-6.84	-6.84	-3.10	1.26	11.59	4.67	224.69
Abu Dhabi										
ETISALAT.AD	16.98	1.07	-3.30	-7.52	-7.52	-13.54	3.46	14.33	4.71	147.67
FAB.AD	12.46	0.32	-2.66	-5.75	-5.75	-10.74	1.10	8.73	5.70	137.65
EMIRATES NBD	16.75	1.21	1.21	-4.29	-4.29	-3.18	0.98	4.88	7.16	105.80
DB ISLAMIC DB	5.50	0.00	-3.17	-5.66	-5.66	-3.85	0.93	6.13	8.18	39.82
EMAR.DU	8.14	-0.12	-1.81	-0.37	-0.37	2.78	0.93	6.06	6.14	71.95
Qatar										
QNB	13.850	0.00	0.00	-2.67	-2.67	-16.21	1.22	8.75	4.69	127.92
INDUSTREIS QAT	12.030	0.25	0.25	0.67	0.67	-8.03	1.82	15.42	6.48	72.78
QA ISLAMIC BK	18.000	0.90	0.90	-1.91	-1.91	-16.28	1.49	10.28	4.03	42.53
MASRAF AL RAYA	2.491	0.65	0.65	7.37	7.37	-6.18	0.96	16.24	4.01	23.17
MESAIEED PETRO	1.890	0.00	0.00	-4.74	-4.74	5.70	1.39	21.93	4.55	23.74
Oman										
BANK MUSCAT	0.263	-0.38	-0.38	0.38	0.38	-0.38	0.84	10.42	5.89	1.97
OMANTEL	1.059	0.86	0.86	2.82	2.82	-0.09	1.23	24.27	5.67	0.79
BANK DHOFAR	0.160	1.27	1.27	0.00	0.00	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.255	1.19	1.19	-1.92	-1.92	-8.93	0.61	9.15	3.33	0.41
OMINVEST	0.408	1.24	1.24	4.62	4.62	-2.86	0.89	8.32	4.90	0.27

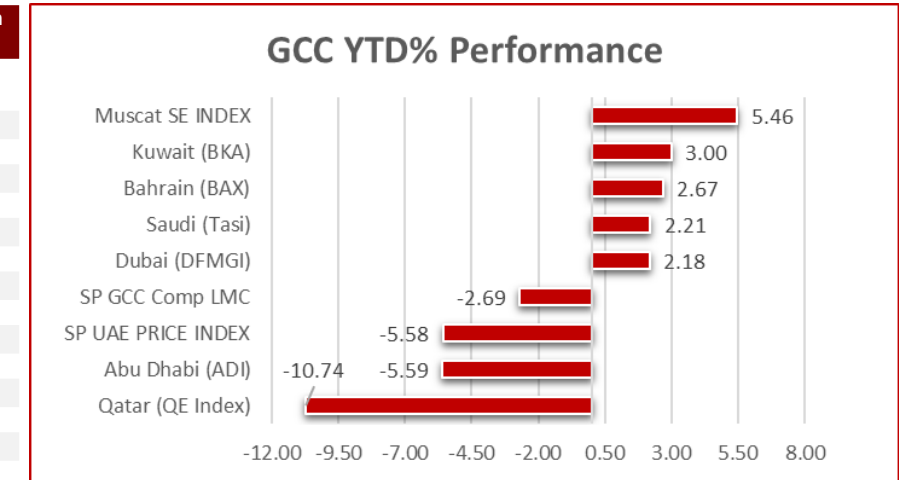
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
17-April-24	24.56%	14.94%	0.06%	2.47%	5.84%	17.96%	12.87%	6.29%	5.38%
24-April-24	24.52%	14.97%	0.06%	2.37%	5.49%	17.92%	12.95%	6.27%	5.42%

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 -0.06 %The leading sector bottom performance indices today are Banking -0.36 % Financial services -0.24 % Insurance -0.15 % respectively

KSA

Saudi Armco has a positive performance today by + 0.17 %, SABIC have positive performance today by + 4.06%. STC has a positive performance today by + 1.47 %, Al Rajhi Bank has a positive performance today by + 1.42 %.



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