



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 28, 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)	12,611.4	0.08	-0.18	6.91	5.38	5.38	2.40	21.56	2.77	11,223.22
Qatar (QE Index)	10,487.1	-0.09	1.78	3.94	-3.17	-3.17	1.24	12.43	4.48	539.65
Dubai (DFMGI)	4,290.4	0.42	1.53	2.91	5.68	5.68	1.44	8.40	5.26	613.42
Abu Dhabi (ADI)	9,283.3	-0.05	0.04	-2.37	-3.08	-3.08	2.51	17.17	2.14	2,562.14
Bahrain (BAX)	2,024.8	-0.90	-1.23	-2.05	2.71	2.71	0.80	10.60	4.59	7.42
Muscat SE INDEX	4,532.6	-0.99	-0.84	-0.64	0.41	0.41	0.77	10.14	4.90	6.34
SP GCC Comp LMC	190.4	-0.30	-0.07	3.81	2.95	2.95	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.0	0.03	0.93	-1.08	-1.30	-1.30				
Developed Markets										
MSCI World Index	3,322.6	-0.28	-0.34	3.66	4.84	4.84				
U.S. (S&P 500)	5,069.8	-0.17	-0.37	4.62	6.29	6.29	4.28	25.19	1.79	44,905.40
U.K. (FTSE 100)	7,625.0	-0.76	-1.05	-0.07	-1.40	-1.40	1.62	12.38	3.90	2,017.73
Japan (topix)	2,675.0	-0.13	0.54	4.85	13.04	13.04	1.58	14.94	2.03	960,225.40
Emerging Markets										
MSCI EM Index	1,018.7	-0.88	-0.93	4.40	-0.49	-0.49				
China (SSE Composite)	2,957.9	-1.91	-1.57	6.07	-0.57	-0.57	1.36	12.00		44,025.04
India (Sensex)	72,304.9	-1.08	-1.15	0.77	0.09	0.09	4.64	22.92	1.14	144,273.19
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (in LC Bn)
Kuwait										
Kuwait All Share Index	7,420.6	-0.17	0.08	2.09	8.85	8.85	1.55		3.15	48.06
Kuwait Premier Index	8,130.6	-0.33	0.03	2.15	8.74	8.74	1.70	17.56	3.03	40.56
Kuwait Main Index	6,094.1	0.66	0.33	2.03	9.42	9.42	1.05		3.80	7.50
Kuwait Sector										
Banking	1,801.9	-0.39	0.16	2.59	9.37	9.37	1.82	17.87	2.75	30.49
Telecom	1,126.1	-0.62	-0.17	-5.41	1.90	1.90	1.68	10.72	6.38	3.48
Industrials	1,022.1	0.11	-0.48	3.75	12.58	12.58	1.14	15.74	2.79	3.53
Financial Services	1,386.7	0.46	-0.14	2.09	14.39	14.39	1.10	13.75	3.40	4.40
Real Estate	1,264.2	-0.24	-0.40	3.32	4.23	4.23	0.97	14.54	1.81	2.72
Basic Materials	784.9	-0.50	-1.15	3.31	5.23	5.23	1.37	11.42	9.91	0.45
Health Care	486.2	2.84	2.84	0.78	0.84	0.84	1.71	11.83	1.76	0.23
Consumer Staples	711.1	0.83	1.07	0.83	7.97	7.97	1.61	16.69	1.75	0.21
Insurance	2,476.3	1.07	1.50	4.87	8.00	8.00	1.36	8.32	3.81	0.99
Consumer Discretionary	1,661.7	1.28	0.59	4.99	3.60	3.60				
Energy	1,062.9	-0.56	0.99	3.90	12.00	12.00	0.82	10.78	4.71	0.22
Technology	2,044.3	0.00	1.81	1.44	253.46	253.46	2.52			0.03
Utilities	452.6	1.77	2.38	1.18	-0.58	-0.58				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Crude oil futures rose and 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 down by - 0.17 % at 7,420.6 value traded 33.4 million KD, Premier market value reached 21.7 million KD down by - 0.33 % at 8,130.6

KSA Market

The market closed up by + 0.08 % at 12,611.4



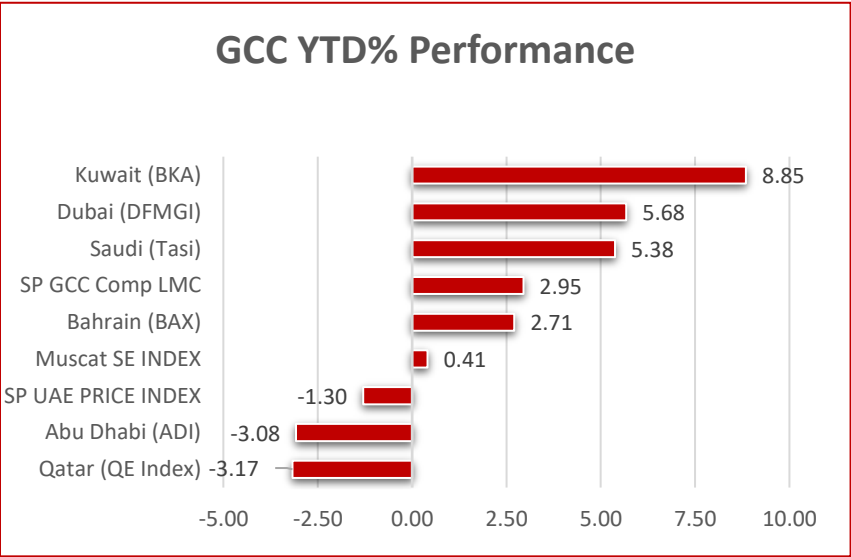
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.976	-0.71	0.10	-0.41	9.17	9.17	1.79	14.37	3.59	7.73
KFH	0.805	-0.12	0.50	4.27	10.88	10.88	2.01	20.93	2.48	12.64
ZAIN	0.510	-0.78	-0.39	-3.04	0.59	0.59	1.77	10.20	6.86	2.21
BOUBYAN BANK	0.641	-0.93	0.00	4.40	6.83	6.83	2.53	34.17	1.25	2.54
AGILITY	0.611	-0.33	-1.77	5.34	20.04	20.04	0.88	18.53	0.00	1.64
Saudi Arabia										
ARAMCO	31.90	-0.16	-0.31	4.25	-3.33	-3.33	4.99	16.24	4.75	7,720.01
SABIC	79.00	1.40	1.01	2.57	-4.31	-4.31	1.36	77.06	4.30	237.01
STC	41.60	-0.24	-0.83	1.96	2.97	2.97	2.63	15.10	3.85	208.01
AL-RAJHI BANK	89.00	0.45	-0.77	7.02	3.93	3.93	3.33	22.53	1.99	356.01
NCB	42.35	0.12	-0.70	4.31	9.57	9.57	1.43	13.10	3.06	254.11
Abu Dhabi										
ETISALAT.AD	18.48	-0.54	0.11	-3.65	-5.91	-5.91	3.77	15.60	4.33	160.72
FAB.AD	13.82	-0.43	0.14	-5.60	-1.00	-1.00	1.22	9.69	5.14	152.68
EMIRATES NBD	18.30	-0.54	3.68	3.39	5.78	5.78	1.05	5.51	6.56	115.91
DB ISLAMIC DB	6.36	-1.24	-0.31	0.63	11.19	11.19	1.03	7.21	7.08	46.05
EMAR.DU	8.10	0.12	0.87	9.02	2.27	2.27	0.96	7.47	3.09	71.59
Qatar										
QNB	15.050	-0.27	0.40	-2.97	-8.95	-8.95	1.27	9.68	4.32	139.29
INDUSTREIS QAT	12.860	0.08	3.46	7.17	-1.68	-1.68	1.95	16.48	6.07	77.80
QA ISLAMIC BK	20.160	-0.69	-0.20	3.38	-6.23	-6.23	1.62	11.66	3.60	47.66
MASRAF AL RAYA	2.490	-1.23	1.55	5.96	-6.21	-6.21	0.94	16.47	4.02	23.15
MESAIEED PETRO	1.885	2.28	6.38	12.20	5.43	5.43	1.39	21.88	4.56	23.67
Oman										
BANK MUSCAT	0.263	-0.38	-0.75	-2.23	-0.38	-0.38	0.84	10.42	5.70	1.97
OMANTEL	1.078	-0.46	0.28	-0.19	1.70	1.70	1.26	29.82	3.01	0.81
BANK DHOFAR	0.145	-3.33	-3.33	-3.33	-9.38	-9.38	0.59	15.52	5.34	0.43
NAT BANK OF OMAN	0.252	-1.56	-0.79	-5.26	-10.00	-10.00	0.61	9.04	3.37	0.41
OMINVEST	0.400	-2.44	-2.44	-11.11	-4.76	-4.76	0.88	10.95	3.75	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 down today by - 0.17 % The leading sector bottom performance indices today are Telecom - 0.62 % Energy - 0.56 % Banking - 0.39 % respectively

KSA

Saudi Armco had a negative performance today by - 0.16 %, SABIC had a positive performance today by + 1.40 %, STC had a negative performance today by - 0.24 %, Al Rajhi Bank had a positive performance today by + 0.45 %

U.A.E

ETISALAT.AD had a negative performance today by - 0.54 %, FAB.AD had a negative performance today by - 0.43 %



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