

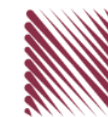


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday , March 28, 2024

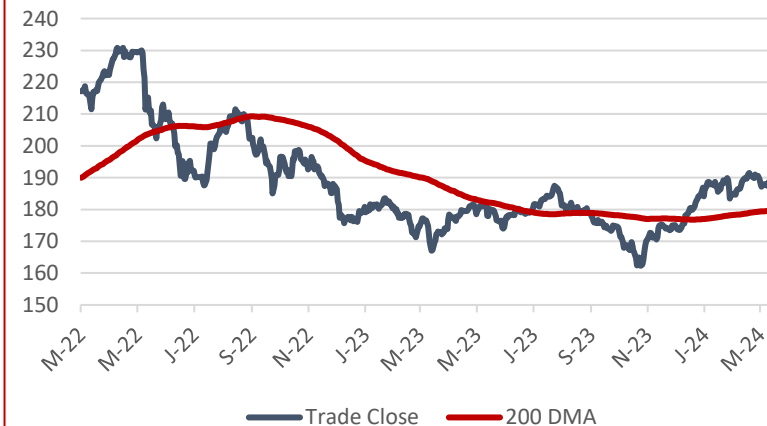




Thursday, March 28, 2024

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,565.9	-0.33	-2.10	-0.51	5.00	5.00	2.42	21.26	2.94	10,967.68
Qatar (QE Index)	9,943.6	-0.14	-2.62	-5.07	-8.19	-8.19	1.18	11.74	4.77	486.61
Dubai (DFMGI)	4,246.3	0.31	-0.80	-1.45	4.59	4.59	1.38	8.32	5.72	605.98
Abu Dhabi (ADI)	9,228.1	-0.39	-1.00	-0.29	-3.65	-3.65	2.63	17.37	2.08	2,610.56
Bahrain (BAX)	2,056.0	-0.60	0.26	2.52	4.28	4.28	0.89	10.80	4.23	8.51
Muscat SE INDEX	4,673.1	-0.80	-2.47	2.60	3.52	3.52	0.78	10.37	5.56	6.50
SP GCC Comp LMC	187.1	0.00	-1.69	-1.74	1.19	1.19	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.6	0.00	-1.45	-0.63	-2.31	-2.31				
Developed Markets										
MSCI World Index	3,437.8	0.03	0.28	3.01	8.47	8.47				
U.S. (S&P 500)	5,254.4	0.00	0.39	3.10	10.16	10.16	4.40	26.12	1.72	46,537.18
U.K. (FTSE 100)	7,952.6	0.00	0.27	4.23	2.84	2.84	1.70	13.09	3.74	2,105.31
Japan (topix)	2,768.6	0.65	-1.59	3.47	17.00	17.00	1.63	15.45	1.96	989,270.78
Emerging Markets										
MSCI EM Index	1,043.2	0.27	0.37	2.18	1.90	1.90				
China (SSE Composite)	3,041.2	1.01	-0.23	0.86	2.23	2.23	1.36	12.00		44,025.04
India (Sensex)	73,651.4	0.90	1.13	1.59	1.95	1.95	4.77	23.49	1.12	146,326.33
Kuwait										
Kuwait All Share Index	7,374.0	0.09	-0.56	-0.89	8.17	8.17	1.51	7.16	3.46	44.48
Kuwait Premier Index	8,082.0	0.10	-0.43	-0.94	8.09	8.09	1.66	17.18	3.22	36.83
Kuwait Main Index	6,046.6	0.03	-1.22	-0.65	8.56	8.56	1.05	1.71	4.67	7.66
Kuwait Sector										
Banking	1,782.2	-0.20	-0.73	-1.54	8.18	8.18	1.77	17.56	2.97	26.69
Telecom	1,068.6	-1.24	-3.99	-4.35	-3.30	-3.30	1.56	10.14	7.87	3.27
Industrials	1,060.0	3.12	4.75	4.41	16.75	16.75	1.17	16.59	3.42	3.62
Financial Services	1,359.2	-0.13	-1.78	-2.02	12.12	12.12	1.09	1.10	3.48	4.55
Real Estate	1,297.2	1.27	-0.29	1.38	6.95	6.95	0.98	14.61	1.86	2.79
Basic Materials	785.5	1.23	0.41	0.69	5.30	5.30	1.35	10.96	9.95	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	747.3	1.49	1.57	4.49	13.47	13.47	1.62	19.49	1.65	0.23
Insurance	2,519.2	0.09	-1.36	-0.06	9.88	9.88	1.40	9.65	3.75	1.02
Consumer Discretionary	1,750.0	-0.55	1.06	5.00	9.11	9.11				
Energy	1,045.9	-1.63	0.94	1.12	10.21	10.21	0.80	10.21	4.82	0.22
Technology	1,906.1	0.00	-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 rose by more than \$1 a barrel on Thursday, after falling for two consecutive sessions, on the prospect of supplies given the OPEC+ producer alliance is widely expected to stay the course on its current production cuts. Brent crude futures for May rose \$1.39, or 1.61%, to settle at \$87.48 a barrel.

Kuwait Market

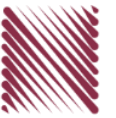
The market closed up by + 0.09% at 7,374.0 value traded 71.6 million KD, Premier market value reached 59.4 million KD up by + 0.1% at 8,082.0.

KSA Market

The market closed down – 0.33 % at 12,565.9

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



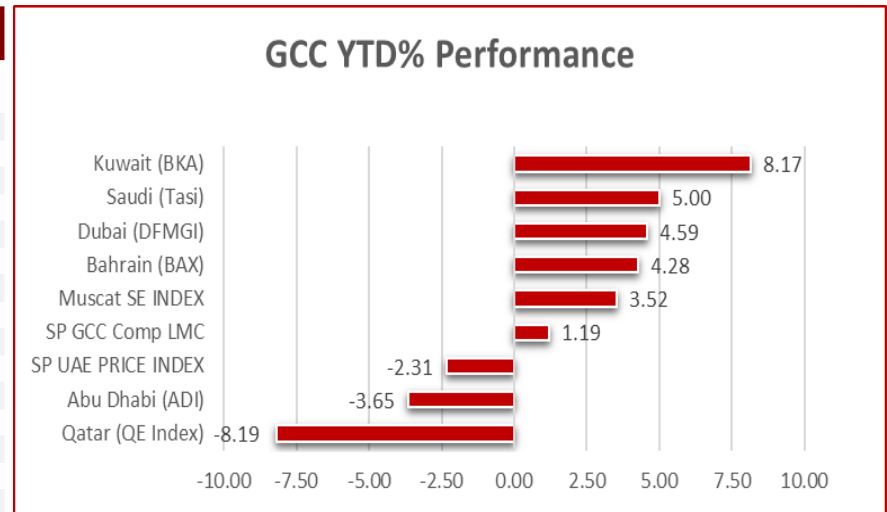
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.960	-0.41	-1.13	-2.04	7.38	7.38	1.76	14.13	3.65	7.66
KFH	0.800	-0.37	-0.87	-1.23	10.19	10.19	2.00	20.80	2.50	12.56
ZAIN	0.491	-0.81	-2.00	-2.39	-3.16	-3.16	1.71	9.86	7.13	2.12
BOUBYAN BANK	0.620	0.65	0.98	-3.58	3.33	3.33	2.44	33.05	1.29	2.45
AGILITY	0.666	7.42	11.19	10.82	30.84	30.84	0.96	20.19	1.50	1.83
Saudi Arabia										
ARAMCO	30.75	-0.16	-1.44	-3.00	-6.82	-6.82	4.85	16.43	5.51	7,441.50
SABIC	78.10	1.43	0.64	-0.89	-6.47	-6.47	1.40	179.59	4.35	234.30
STC	39.60	-0.38	-0.13	-6.71	-1.98	-1.98	2.50	14.89	4.04	198.00
AL-RAJHI BANK	83.10	-1.42	-5.57	-6.63	-3.93	-3.93	3.11	21.04	2.77	332.40
NCB	40.80	4.88	1.37	-3.66	5.56	5.56	1.38	12.62	3.18	244.80
Abu Dhabi										
ETISALAT.AD	18.32	0.22	0.22	1.44	-6.52	-6.52	3.74	15.50	4.36	159.67
FAB.AD	13.40	-1.34	-2.36	-3.08	-5.30	-5.30	1.16	9.27	5.37	146.05
EMIRATES NBD	17.50	1.16	-0.85	-4.37	1.16	1.16	1.01	5.27	6.86	110.54
DB ISLAMIC DB	5.83	-0.17	-0.68	-9.47	1.92	1.92	0.95	6.61	7.72	42.21
EMAR.DU	8.17	0.25	-2.51	0.62	3.16	3.16	0.93	6.08	6.12	72.21
Qatar										
QNB	14.200	-0.07	-3.73	-6.76	-14.10	-14.10	1.20	9.13	4.58	132.73
INDUSTREIS QAT	11.970	-0.17	-1.32	-7.21	-8.49	-8.49	1.81	15.34	6.52	72.36
QA ISLAMIC BK	19.000	-0.26	-2.31	-5.71	-11.63	-11.63	1.53	10.99	3.82	45.16
MASRAF AL RAYA	2.374	0.59	-5.98	-6.17	-10.58	-10.58	0.90	15.71	4.21	22.08
MESAIEED PETRO	1.961	0.00	1.34	3.76	9.68	9.68	1.44	22.76	4.39	24.64
Oman										
BANK MUSCAT	0.262	-0.76	-5.42	0.00	-0.76	-0.76	0.84	10.38	5.92	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	0.252	-5.62	-6.67	0.00	-10.00	-10.00	0.61	9.04	3.37	0.41
OMINVEST	0.385	0.79	-0.77	-1.28	-8.33	-8.33	0.85	10.54	3.90	0.26

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
20-March-24	24.57%	14.95%	0.06%	2.55%	5.62%	18.03%	12.78%	6.30%	5.33%
27-March-24	24.58%	14.94%	0.06%	2.52%	5.71%	17.99%	12.79%	6.29%	5.37%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.09 %The leading sector best performance indices today are Industrials 3.12 % Consumer services 1.49 % Real estate 1.27 % respectively

KSA

Saudi Armco have negative performance today by -0.16 %, SABIC have positive performance today by + 1.4%. STC have negative performance today by -0.38 %, Al Rajhi Bank have negative performance today by -1.42 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw