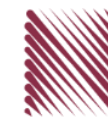


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 29th May 2024



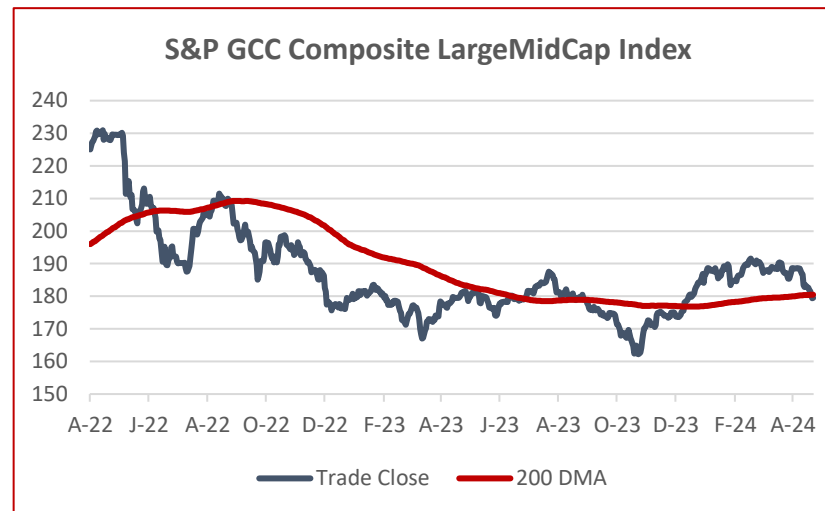


Wednesday, May 29, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,696.5	0.31	-2.50	-5.63	-5.69	-2.26	2.22	19.72	3.31	10,312.70
Qatar (QE Index)	9,279.1	-1.04	-2.96	-4.61	-5.77	-14.33	1.07	10.54	5.13	463.02
Dubai (DFMGI)	3,959.8	-0.68	-1.32	-4.72	-6.75	-2.46	1.34	7.93	6.15	576.99
Abu Dhabi (ADI)	8,711.0	-0.36	-1.39	-3.93	-5.60	-9.05	2.50	15.58	2.21	2,419.69
Bahrain (BAX)	2,035.8	0.70	0.77	0.33	-0.34	3.26	0.88	11.09	4.26	8.37
Muscat SE INDEX	4,825.6	-0.07	0.48	0.86	4.10	6.90	0.82	10.28	5.69	6.63
SP GCC Comp LMC	171.8	0.16	-2.11	-5.43	-7.31	-7.09	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	122.4	-0.91	-2.42	-6.65	-9.12	-11.22				
Developed Markets										
MSCI World Index	3,430.0	-1.00	-0.93	3.77	-0.23	8.23				
U.S. (S&P 500)	5,267.0	-0.74	-0.71	4.59	0.24	10.42	4.38	25.72	1.66	46,540.52
U.K. (FTSE 100)	8,183.1	-0.86	-1.62	0.48	2.90	5.82	1.75	14.71	3.72	2,166.15
Japan (topix)	2,726.2	-0.56	-0.60	-0.62	-1.53	15.21	1.43	15.22	2.11	964,830.16
Emerging Markets										
MSCI EM Index	1,072.1	-1.46	-1.00	2.50	2.77	4.73				
China (SSE Composite)	3,091.7	-0.62	0.09	-0.42	1.66	3.92	1.36	12.00		44,025.04
India (Sensex)	74,502.9	-0.89	-1.20	0.03	1.16	3.13	4.77	22.31	1.18	147,310.74

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,067.4	0.13	-0.94	0.23	-3.55	3.67	1.44	15.16	3.63	42.69
Kuwait Premier Index	7,707.3	0.19	-0.99	0.21	-4.10	3.08	1.57	16.57	3.44	35.09
Kuwait Main Index	5,941.0	-0.18	-0.71	0.36	-0.75	6.67	1.04	10.34	4.57	7.59
Kuwait Sector										
Banking	1,750.3	0.20	-0.76	1.12	-1.20	6.24	1.74	17.37	3.03	26.21
Telecom	987.6	0.02	-1.59	-5.38	-7.27	-10.63	1.45	11.77	8.51	3.02
Industrials	741.0	0.83	-0.81	-3.56	-29.12	-18.39	0.78	11.04	5.83	2.51
Financial Services	1,360.3	-0.10	-1.26	2.02	0.50	12.21	1.09	12.18	2.96	4.66
Real Estate	1,328.5	0.41	-0.28	3.32	2.54	9.53	1.02	14.32	1.98	2.82
Basic Materials	833.8	0.14	0.23	-2.43	5.56	11.78	1.50	14.71	10.51	0.47
Health Care	445.9	0.00	0.00	-8.49	29.78	-7.52	1.59	10.95	1.93	
Consumer Staples	866.5	-2.80	-6.78	4.03	12.14	31.57	1.88	19.23	2.37	0.26
Insurance	2,486.1	0.18	-0.21	-0.04	-3.17	8.43	1.36	12.24	3.19	1.00
Consumer Discretionary	1,581.6	-1.54	-3.94	-5.87	-9.71	-1.39				
Energy	1,075.1	-0.95	-1.12	1.25	3.07	13.28	0.88	7.69	5.94	0.22
Technology	1,709.6	0.43	-1.26	-10.31	-10.31	195.60	2.11			0.02
Utilities	410.5	-0.64	-1.27	-6.02	-7.69	-9.83				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were down on Thursday as the markets wait on the latest U.S. crude oil stockpiles data while resilient U.S. economic activity pointed to borrowing costs staying higher for longer in a potential blow to demand. Brent futures lost 9 cents, or 0.1%, to trade at \$83.52 a barrel.

Kuwait Market

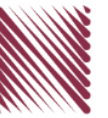
The market closed up by 0.13% at 7,067.4 value traded 45.5 million KD, Premier market value reached 36.5 million KD up by + 0.19% at 7,707.3.

KSA Market

The market closed up by + 0.31% at 11,696.5.

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	0.862	0.70	-0.12	-0.35	-4.73	1.24	1.70	13.03	3.87	7.18
KFH	0.735	0.14	-1.21	2.08	0.65	10.35	2.15	21.63	2.50	12.58
ZAIN	0.449	-0.22	-2.18	-7.99	-8.92	-11.44	1.56	10.20	7.80	1.95
BOUBYAN BANK	0.585	0.69	0.69	-0.68	0.34	3.35	2.46	31.22	1.29	2.46
AGILITY	0.297	1.71	-1.66	-6.01	-18.38	4.87	0.80	8.72	6.73	0.80
Saudi Arabia										
ARAMCO	29.05	-0.68	-3.01	-3.49	-5.83	-11.97	4.61	16.02	6.45	7,030.29
SABIC	75.50	0.53	-1.69	-10.65	-3.58	-9.58	1.36	198.04	4.37	226.51
STC	36.40	0.00	-1.22	-3.32	-5.62	-7.49	2.26	13.51	4.40	182.00
AL-RAJHI BANK	77.20	-0.52	-2.40	-3.38	-6.20	-10.75	2.85	18.99	2.98	308.81
NCB	34.90	5.76	2.80	-7.18	-13.18	-9.70	1.15	10.78	5.01	209.41
Abu Dhabi										
ETISALAT.AD	15.00	0.00	-2.60	-11.76	-18.30	-23.63	2.99	12.49	5.33	131.30
FAB.AD	11.64	0.52	-1.69	-6.73	-11.95	-16.62	1.08	8.09	6.10	129.68
EMIRATES NBD	15.45	-0.96	-1.59	-9.12	-11.71	-10.69	0.90	4.50	7.77	98.52
DB ISLAMIC DB	5.51	-1.08	0.18	-0.90	-5.49	-3.67	0.93	6.14	8.17	40.32
EMAR.DU	7.50	-3.10	-4.09	-8.65	-8.20	-5.30	0.84	5.84	6.67	66.37
Qatar										
QNB	12.960	-0.31	-4.00	-6.56	-8.92	-21.60	1.15	8.19	5.02	120.93
INDUSTREIS QAT	11.460	-1.38	-2.39	-6.45	-4.10	-12.39	1.90	14.34	6.81	69.35
QA ISLAMIC BK	17.180	-1.94	-1.60	-6.12	-6.38	-20.09	1.42	9.81	4.22	40.58
MASRAF AL RAYA	2.370	-1.37	-4.01	-5.65	2.16	-10.73	0.92	15.45	4.22	22.00
MESAEED PETRO	1.695	-1.45	-3.69	-11.67	-14.57	-5.20	1.31	21.13	5.07	21.30
Oman										
BANK MUSCAT	0.255	-1.16	-1.92	-2.67	-2.67	-3.41	0.83	9.95	6.08	1.92
OMANTEL	1.056	0.00	-0.28	1.05	2.52	-0.38	1.29	11.92	5.68	0.79
BANK DHOFAR	0.154	-0.65	1.32	-3.75	-3.75	-3.75	0.64	15.28	5.03	0.46
NAT BANK OF OMAN	0.275	0.00	-0.72	7.00	5.77	-1.79	0.66	9.63	3.09	0.45
OMINVEST	0.387	-0.77	2.38	0.78	5.43	-2.10	0.82	8.41	5.17	0.26

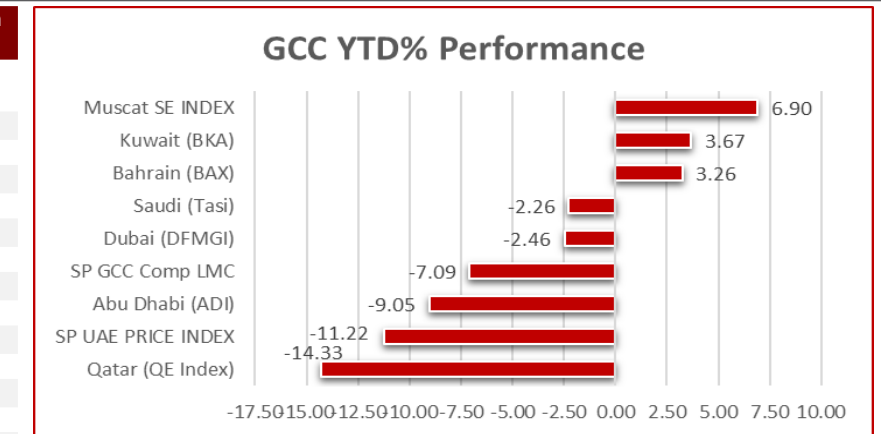
* GCC Markets performance at the latest close.

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 up today by + 0.13 %The leading sector best performance indices today are Industrials 0.83 % Technology 0.43 % Real estate 0.41% respectively.

KSA

Saudi Armco have negative performance today by -0.68 %, SABIC have positive performance today by + 0.53%, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.52 %.



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