



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 29th April 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)	12,369.5	1.13	0.94	-0.26	-0.26	3.36	2.36	21.06	3.09	10,780.49
Qatar (QE Index)	9,744.0	0.79	1.10	-1.05	-1.05	-10.03	1.13	11.11	4.87	489.85
Dubai (DFMGI)	4,160.7	0.30	0.30	-2.02	-2.02	2.48	1.36	8.08	5.83	597.61
Abu Dhabi (ADI)	9,063.3	0.23	0.23	-1.79	-1.79	-5.37	2.58	16.89	2.11	2,539.96
Bahrain (BAX)	2,026.5	0.12	0.48	-0.79	-0.79	2.79	0.87	10.67	4.26	8.25
Muscat SE INDEX	4,774.9	0.30	1.30	3.00	3.00	5.78	0.81	10.63	5.46	6.62
SP GCC Comp LMC	182.1	1.19	1.45	-1.77	-1.77	-1.53	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.8	0.49	0.49	-2.87	-2.87	-5.12				
Developed Markets										
MSCI World Index	3,347.0	0.36	0.36	-2.64	-2.64	5.61				
U.S. (S&P 500)	5,116.2	0.32	0.32	-2.63	-2.63	7.26	4.22	25.21	1.73	45,134.46
U.K. (FTSE 100)	8,147.0	0.09	0.09	2.44	2.44	5.35	1.74	13.45	3.66	2,154.86
Japan (topix)	2,686.5	0.86	2.29	-2.97	-2.97	13.53	1.55	14.95	2.06	954,998.74
Emerging Markets										
MSCI EM Index	1,051.3	0.94	0.94	0.78	0.78	2.70				
China (SSE Composite)	3,113.0	0.79	0.79	2.36	2.36	4.64	1.36	12.00		44,025.04
India (Sensex)	74,671.3	1.28	1.28	1.38	1.38	3.37	4.84	22.70	1.12	147,547.02
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,042.9	0.30	0.24	-3.88	-3.88	3.31	1.43	14.95	3.58	42.31
Kuwait Premier Index	7,682.6	0.38	0.25	-4.41	-4.41	2.75	1.56	16.41	3.41	34.85
Kuwait Main Index	5,913.0	-0.11	0.17	-1.21	-1.21	6.16	1.03	10.08	4.45	7.46
Kuwait Sector										
Banking	1,728.7	0.41	0.05	-2.42	-2.42	4.93	1.71	17.20	3.08	25.78
Telecom	1,041.9	-0.29	0.48	-2.18	-2.18	-5.73	1.53	9.91	8.04	3.19
Industrials	768.9	0.52	1.88	-26.45	-26.45	-15.31	0.81	11.78	4.59	2.59
Financial Services	1,329.5	-0.15	-0.39	-1.77	-1.77	9.68	1.06	13.16	3.25	4.47
Real Estate	1,290.3	0.71	0.75	-0.41	-0.41	6.38	0.98	13.84	2.07	2.73
Basic Materials	854.7	0.86	1.55	8.20	8.20	14.58	1.45	11.82	9.23	0.48
Health Care	469.1	-0.98	4.22	36.54	36.54	-2.70	1.69	11.89	1.82	
Consumer Staples	830.5	-1.02	-1.14	7.49	7.49	26.11	1.82	21.89	1.47	0.26
Insurance	2,550.8	-0.09	-0.24	-0.65	-0.65	11.25	1.39	13.48	3.11	1.03
Consumer Discretionary	1,656.1	0.02	0.28	-5.45	-5.45	3.26				
Energy	1,060.8	0.80	2.26	1.70	1.70	11.77	0.86	10.15	4.79	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	410.5	0.65	0.65	-7.69	-7.69	-9.83				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil edged down in early trade on Tuesday after Israel-Hamas ceasefire talks in Cairo helped quell market fears of an expanded conflict in the Middle East, while worries about the outlook for U.S. interest rates weighed on the market. Brent crude futures dipped 5 cents, or 0.06%, to \$88.35 a barrel.

Kuwait Market

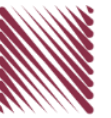
The market closed up by + 0.3% at 7,042.9 value traded 55.1 million KD, Premier market value reached 47.3 million KD up by + 0.38 % at 7,682.6.

KSA Market

The market closed up by + 1.13% at 12,369.5.

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	0.861	-0.46	-0.23	-4.84	-4.84	1.12	1.70	13.49	3.87	7.17
KFH	0.723	0.84	0.00	-1.00	-1.00	8.55	2.12	21.28	2.54	12.37
ZAIN	0.490	-0.41	1.03	-0.61	-0.61	-3.35	1.70	9.84	7.14	2.12
BOUBYAN BANK	0.584	0.69	0.17	0.17	0.17	3.17	2.46	31.16	1.29	2.45
AGILITY	0.319	0.63	5.28	-12.34	-12.34	12.63	0.46	9.74	3.13	0.85
Saudi Arabia										
ARAMCO	30.10	-0.17	0.00	-2.43	-2.43	-8.79	4.75	16.08	5.63	7,284.39
SABIC	85.50	4.27	8.50	9.20	9.20	2.40	1.53	196.60	3.98	256.51
STC	38.05	0.40	1.87	-1.34	-1.34	-3.30	2.40	14.31	4.20	190.26
AL-RAJHI BANK	80.30	2.16	3.61	-2.43	-2.43	-7.17	3.01	20.33	2.86	321.21
NCB	37.85	1.07	2.44	-5.85	-5.85	-2.07	1.28	11.71	4.62	227.11
Abu Dhabi										
ETISALAT.AD	17.00	0.12	0.12	-7.41	-7.41	-13.44	3.47	14.35	4.71	147.84
FAB.AD	12.50	0.32	0.32	-5.45	-5.45	-10.46	1.10	8.76	5.68	138.09
EMIRATES NBD	16.80	0.30	0.30	-4.00	-4.00	-2.89	0.98	4.90	7.14	106.12
DB ISLAMIC DB	5.56	1.09	1.09	-4.63	-4.63	-2.80	0.94	6.19	8.09	40.26
EMAR.DU	8.14	0.00	0.00	-0.37	-0.37	2.78	0.93	6.06	6.14	71.95
Qatar										
QNB	13.870	0.14	0.14	-2.53	-2.53	-16.09	1.23	8.76	4.69	128.11
INDUSTREIS QAT	12.270	2.00	2.25	2.68	2.68	-6.19	1.86	15.73	6.36	74.23
QA ISLAMIC BK	18.200	1.11	2.02	-0.82	-0.82	-15.35	1.50	10.40	3.98	43.01
MASRAF AL RAYA	2.506	0.60	1.25	8.02	8.02	-5.61	0.97	16.33	3.99	23.31
MESAIEED PETRO	1.901	0.58	0.58	-4.18	-4.18	6.32	1.40	22.06	4.52	23.88
Oman										
BANK MUSCAT	0.263	0.00	-0.38	0.38	0.38	-0.38	0.84	10.42	5.89	1.98
OMANTEL	1.055	-0.38	0.48	2.43	2.43	-0.47	1.22	24.18	5.69	0.79
BANK DHOFAR	0.160	0.00	1.27	0.00	0.00	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.256	0.39	1.59	-1.54	-1.54	-8.57	0.62	9.19	3.32	0.42
OMINVEST	0.406	-0.49	0.74	4.10	4.10	-3.33	0.88	8.28	4.93	0.27

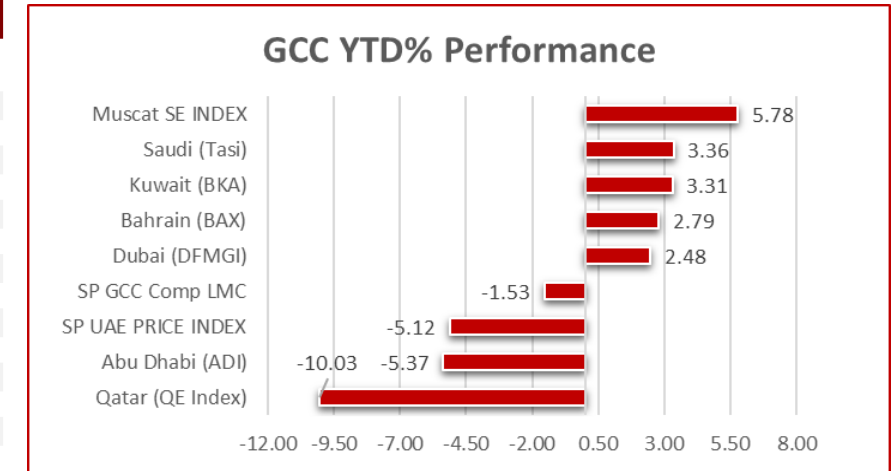
* GCC Markets performance at the latest close.

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 up today by + 0.3 %The leading sector best performance indices today are Basic materials 0.86 % Energy 0.8 % Real estate 0.71 % respectively.

KSA

Saudi Armco have negative performance today by -0.17 %, SABIC have positive performance today by + 4.2%. STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a positive performance today by + 2.16 %.



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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