

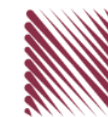


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , 2nd April 2024





Tuesday, April 2, 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)	12,476.6	0.43	-0.71	0.61	0.61	4.25	2.39	21.02	2.95	10,911.09
Qatar (QE Index)	9,794.5	-0.71	-1.50	-0.53	-0.53	-9.57	1.13	11.57	4.86	493.57
Dubai (DFMGI)	4,269.4	0.14	0.54	0.54	0.54	5.16	1.38	8.37	5.69	608.48
Abu Dhabi (ADI)	9,252.6	0.08	0.27	0.27	0.27	-3.40	2.63	17.40	2.08	2,617.42
Bahrain (BAX)	2,029.3	-0.22	-1.30	-0.65	-0.65	2.93	0.87	10.61	4.28	8.16
Muscat SE INDEX	4,672.6	0.20	-0.01	0.79	0.79	3.51	0.78	10.24	5.58	6.49
SP GCC Comp LMC	186.3	0.45	-0.47	0.47	0.47	0.71	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.8	0.43	0.84	0.84	0.84	-1.50				
Developed Markets										
MSCI World Index	3,403.4	-0.62	-1.00	-1.00	-1.00	7.39				
U.S. (S&P 500)	5,205.8	-0.72	-0.92	-0.92	-0.92	9.14	4.34	25.84	1.74	46,104.51
U.K. (FTSE 100)	7,935.1	-0.22	-0.22	-0.22	-0.22	2.61	1.69	13.07	3.74	2,100.14
Japan (topix)	2,706.5	-0.29	-2.24	-2.24	-2.24	14.37	1.60	15.15	2.00	969,420.49
Emerging Markets										
MSCI EM Index	1,049.9	0.75	0.65	0.65	0.65	2.56				
China (SSE Composite)	3,069.3	-0.18	0.92	0.92	0.92	3.17	1.36	12.00		44,025.04
India (Sensex)	73,903.9	-0.15	0.34	0.34	0.34	2.30	4.79	23.55	1.12	146,808.71

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,368.1	0.19	-0.08	0.56	0.56	8.08	1.51	6.52	3.45	44.41
Kuwait Premier Index	8,089.3	0.18	0.09	0.65	0.65	8.19	1.65	17.20	3.22	36.86
Kuwait Main Index	5,989.8	0.24	-0.94	0.07	0.07	7.54	1.05	1.48	4.64	7.55
Kuwait Sector										
Banking	1,787.9	0.32	0.32	0.92	0.92	8.53	1.78	17.62	2.97	26.78
Telecom	1,062.0	-0.49	-0.62	-0.29	-0.29	-3.90	1.55	10.07	7.91	3.25
Industrials	1,032.6	-0.35	-2.58	-1.22	-1.22	13.73	1.09	16.35	3.41	3.52
Financial Services	1,356.6	0.11	-0.19	0.23	0.23	11.91	1.09	0.93	3.49	4.54
Real Estate	1,314.2	0.54	1.31	1.43	1.43	8.35	1.01	14.58	1.86	2.80
Basic Materials	785.3	0.15	-0.03	-0.59	-0.59	5.27	1.35	10.96	9.96	0.44
Health Care	327.5	2.11	-32.59	-4.67	-4.67	-32.07	1.17	8.22	2.63	
Consumer Staples	814.5	2.68	8.99	5.41	5.41	23.67	1.77	21.25	1.51	0.25
Insurance	2,564.7	-0.66	1.80	-0.10	-0.10	11.86	1.40	13.56	3.21	1.03
Consumer Discretionary	1,755.0	0.13	0.28	0.19	0.19	9.42				
Energy	1,039.4	-0.39	-0.62	-0.34	-0.34	9.52	0.80	10.00	4.85	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	447.4	0.59	0.59	0.59	0.59	-1.73				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended gains on Wednesday as a larger than expected fall in U.S. crude inventories and escalating geopolitical tensions raised investor worries about tighter supplies. Brent futures for June delivery rose 20 cents, or 0.22%, to \$89.12 per barrel.

Kuwait Market

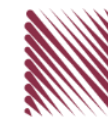
The market closed up by + 0.19% at 7,368.1 value traded 40.6 million KD, Premier market value reached 32.6 million KD down by + 0.18% at 8,089.3.

KSA Market

The market closed up + 0.43 % at 12,476.6.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



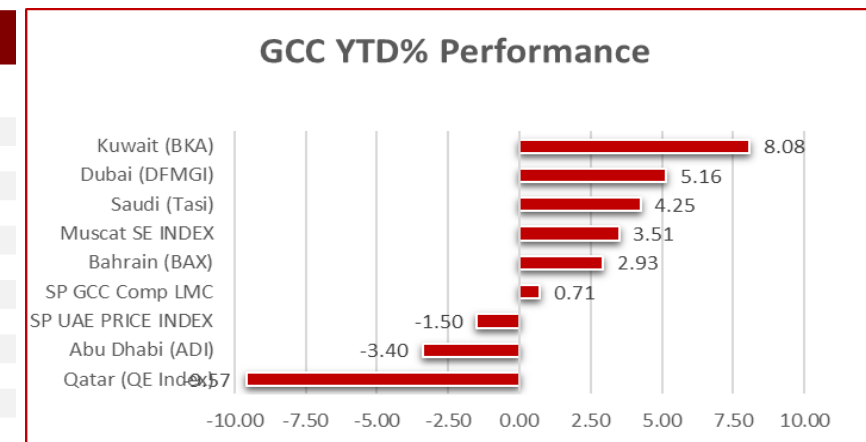
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.963	0.42	0.31	1.37	1.37	7.72	1.77	14.18	3.63	7.63
KFH	0.805	0.50	0.63	1.13	1.13	10.88	2.01	20.93	2.48	12.64
ZAIN	0.492	-0.61	0.20	-0.20	-0.20	-2.96	1.71	9.88	7.11	2.13
BOUBYAN BANK	0.617	-0.48	-0.48	-0.16	-0.16	2.83	2.43	32.89	1.30	2.46
AGILITY	0.629	-1.56	-5.56	-3.82	-3.82	23.58	0.91	19.21	1.59	1.68
Saudi Arabia										
ARAMCO	30.60	-0.49	-0.49	-0.81	-0.81	-7.27	4.82	16.35	5.54	7,405.40
SABIC	83.00	5.46	6.27	6.00	6.00	-0.60	1.49	190.85	4.10	249.01
STC	38.50	-1.03	-2.78	-2.78	-2.78	-4.70	2.43	14.48	4.16	192.51
AL-RAJHI BANK	82.20	0.86	-1.08	-0.12	-0.12	-4.97	3.08	20.81	2.80	328.81
NCB	40.00	0.76	-1.96	-0.50	-0.50	3.49	1.35	12.38	3.24	240.01
Abu Dhabi										
ETISALAT.AD	18.30	0.11	-0.33	-0.33	-0.33	-6.82	3.73	15.44	4.37	159.15
FAB.AD	13.50	0.45	2.12	2.12	2.12	-3.30	1.19	9.46	5.26	149.14
EMIRATES NBD	17.45	0.00	-0.29	-0.29	-0.29	0.87	1.00	5.25	6.88	110.54
DB ISLAMIC DB	5.81	0.00	-0.34	-0.34	-0.34	1.57	0.94	6.59	7.75	42.21
EMAR.DU	8.58	2.51	5.02	5.02	5.02	8.33	0.98	6.39	5.83	75.66
Qatar										
QNB	14.160	-0.84	-0.28	-0.49	-0.49	-14.34	1.20	9.11	4.59	130.79
INDUSTREIS QAT	12.180	0.66	1.75	1.92	1.92	-6.88	1.84	15.61	6.40	73.69
QA ISLAMIC BK	18.450	-0.91	-2.89	0.54	0.54	-14.19	1.48	10.67	3.93	43.71
MASRAF AL RAYA	2.350	0.51	-1.01	1.29	1.29	-11.49	0.89	15.55	4.26	21.86
MESAIEED PETRO	1.970	0.10	0.46	-0.71	-0.71	10.18	1.45	22.86	4.37	24.60
Oman										
BANK MUSCAT	0.264	0.38	0.76	0.76	0.76	0.00	0.84	10.46	5.87	1.99
OMANTEL	1.054	1.35	-2.41	2.33	2.33	-0.57	1.24	29.16	5.69	0.79
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.252	0.00	0.00	-3.08	-3.08	-10.00	0.61	9.04	3.37	0.41
OMINVEST	0.420	5.00	9.09	7.69	7.69	0.00	0.92	11.50	4.76	0.28

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 + 0.19 %The leading sector best performance indices today are Consumer services 2.68 % Health care 2.11 % Utilities 0.59 % respectively

KSA

Saudi Armco have negative performance today by -0.49 %, SABIC have positive performance today by + 5.4%. STC have negative performance today by -1.03 %, Al Rajhi Bank has a positive performance today by + 0.86 %



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