



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , March 31, 2024





Sunday, March 31, 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)	12,401.6	-1.31	-1.31	-1.82	3.63	3.63	2.38	20.91	2.98	10,937.78
Qatar (QE Index)	9,847.1	-0.97	-0.97	-5.99	-9.08	-9.08	1.14	11.63	4.84	495.20
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)	2,042.7	-0.65	-0.65	1.86	3.61	3.61	0.88	10.72	4.26	8.27
Muscat SE INDEX	4,635.7	-0.80	-0.80	1.78	2.69	2.69	0.78	10.31	5.61	6.45
SP GCC Comp LMC	185.4	-0.94	-0.94	-2.66	0.24	0.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.6	0.00	0.00	-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

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,327.2	-0.63	-0.63	-1.52	7.48	7.48	1.51	7.16	3.46	44.48
Kuwait Premier Index	8,036.7	-0.56	-0.56	-1.50	7.48	7.48	1.66	17.18	3.22	36.83
Kuwait Main Index	5,985.6	-1.01	-1.01	-1.65	7.47	7.47	1.05	1.71	4.67	7.66
Kuwait Sector										
Banking	1,771.6	-0.60	-0.60	-2.13	7.53	7.53	1.77	17.56	2.97	26.69
Telecom	1,065.1	-0.33	-0.33	-4.67	-3.62	-3.62	1.56	10.14	7.87	3.27
Industrials	1,045.3	-1.38	-1.38	2.96	15.14	15.14	1.17	16.59	3.42	3.62
Financial Services	1,353.5	-0.42	-0.42	-2.43	11.66	11.66	1.09	1.10	3.48	4.55
Real Estate	1,295.6	-0.12	-0.12	1.26	6.82	6.82	0.98	14.61	1.86	2.79
Basic Materials	789.9	0.56	0.56	1.26	5.90	5.90	1.35	10.96	9.95	0.44
Health Care	343.6	-29.29	-29.29	-29.33	-28.74	-28.74	1.76	12.16	1.71	0.24
Consumer Staples	772.7	3.39	3.39	8.04	17.32	17.32	1.62	19.49	1.65	0.23
Insurance	2,567.4	1.91	1.91	1.85	11.98	11.98	1.40	9.65	3.75	1.02
Consumer Discretionary	1,751.7	0.09	0.09	5.10	9.21	9.21				
Energy	1,043.0	-0.28	-0.28	0.84	9.90	9.90	0.80	10.21	4.82	0.22
Technology	1,906.1	0.00	0.00	-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 edged down slightly on Monday, holding on to most of their recent gains amid expectations of tighter supply from OPEC+ cuts, attacks on Russian refineries and upbeat Chinese manufacturing data. Brent crude fell 17 cents, or 0.2%, to \$86.83 a barrel.

Kuwait Market

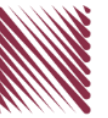
The market closed down by -0.63% at 7,327.2 value traded 54.7 million KD, Premier market value reached 40.9 million KD down by -0.56% at 8,036.7.

KSA Market

The market closed down – 1.31 % at 12,401.6

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



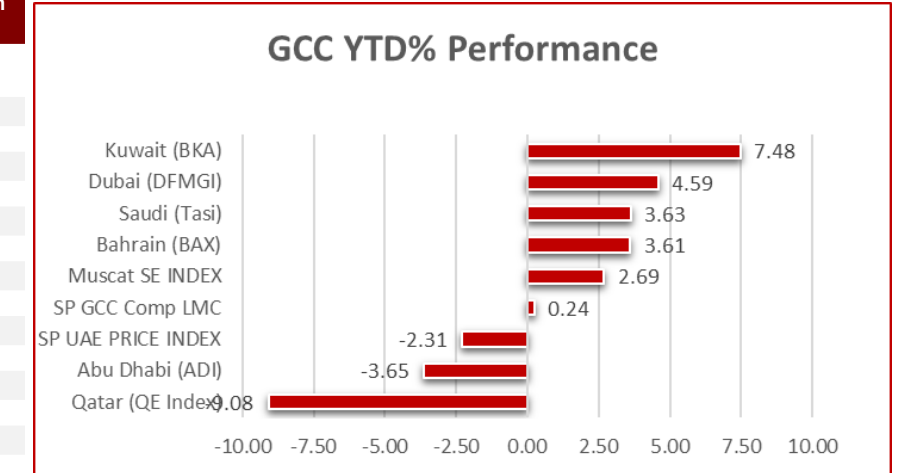
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.950	-1.04	-1.04	-3.06	6.26	6.26	1.74	13.98	3.68	7.53
KFH	0.796	-0.50	-0.50	-1.73	9.64	9.64	1.99	20.69	2.51	12.49
ZAIN	0.493	0.41	0.41	-1.99	-2.76	-2.76	1.71	9.90	7.10	2.13
BOUBYAN BANK	0.618	-0.32	-0.32	-3.89	3.00	3.00	2.44	32.94	1.29	2.45
AGILITY	0.654	-1.80	-1.80	8.82	28.49	28.49	0.94	19.83	1.53	1.75
Saudi Arabia										
ARAMCO	30.85	0.33	0.33	-2.68	-6.52	-6.52	4.86	16.49	5.49	7,465.70
SABIC	78.30	0.26	0.26	-0.63	-6.23	-6.23	1.40	180.05	4.34	234.90
STC	39.60	0.00	0.00	-6.71	-1.98	-1.98	2.50	14.89	4.04	198.00
AL-RAJHI BANK	82.30	-0.96	-0.96	-7.53	-4.86	-4.86	3.08	20.83	2.79	329.20
NCB	40.20	-1.47	-1.47	-5.08	4.01	4.01	1.36	12.44	3.23	241.20
Abu Dhabi										
ETISALAT.AD	18.36	0.22	0.22	1.44	-6.52	-6.52	3.74	15.50	4.36	159.50
FAB.AD	13.22	-1.34	-2.36	-3.08	-5.30	-5.30	1.16	9.27	5.37	146.27
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	71.95
Qatar										
QNB	14.230	0.21	0.21	-6.57	-13.91	-13.91	1.20	9.15	4.57	132.17
INDUSTREIS QAT	11.950	-0.17	-0.17	-7.36	-8.64	-8.64	1.81	15.32	6.53	72.36
QA ISLAMIC BK	18.350	-3.42	-3.42	-8.93	-14.65	-14.65	1.48	10.61	3.95	43.43
MASRAF AL RAYA	2.320	-2.27	-2.27	-8.30	-12.62	-12.62	0.88	15.35	4.31	21.59
MESAIEED PETRO	1.984	1.17	1.17	4.97	10.96	10.96	1.46	23.02	4.33	24.93
Oman										
BANK MUSCAT	0.262	0.00	0.00	0.00	-0.76	-0.76	0.84	10.38	5.92	1.97
OMANTEL	1.030	-4.63	-4.63	-4.45	-2.83	-2.83	1.21	28.49	5.83	0.78
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	0.260	3.17	3.17	3.17	-7.14	-7.14	0.63	9.33	3.27	0.42
OMINVEST	0.390	1.30	1.30	0.00	-7.14	-7.14	0.86	10.68	3.85	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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.63 %The leading sector bottom performance indices today are Health care -29.29 % Industrials -1.38 % Banking -0.6 % respectively

KSA

Saudi Armco has a positive performance today by + 0.33 %, SABIC have positive performance today by + 0.25%. STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.96 %



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