

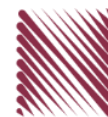


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday , 3rd April 2024





Market Watch

Wednesday, April 3, 2024

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,705.42	1.17	1.10	7.00	5.47	5.47	10,926 SAR	2.38	20.77
Qatar (QE Index)	9,816.30	-1.05	-4.56	-3.94	-10.51	-10.51	511 QAR	1.20	13.35
Dubai (DFMGI)	4,244.15	-0.69	-0.44	1.70	4.44	4.44	606 AED	1.48	18.71
Abu Dhabi (ADI)	9,237.26	-0.47	-2.31	-3.14	-3.85	-3.85	1,435 AED	1.66	17.27
Bahrain (BAX)	2,021.54	-0.36	-2.20	-2.18	2.56	2.56	10 BHD	1.89	8.53
MUSCAT SE INDEX	4,680.67	-0.19	0.72	2.23	3.31	3.31	5 OMR	0.99	12.01
SP GCC Comp LMC	188.66	0.60	-1.29	2.17	1.31	1.31			
SP UAE PRICE INDEX	135.38	-0.68	-2.31	-1.96	-2.17	-2.17			
Developed Markets									
MSCI World Index	3,402.36	0.18	3.79	6.37	7.59	7.59			
U.S. (S&P 500)	5,204.34	0.11	4.11	7.55	9.26	9.26			
U.K. (FTSE 100)	7,911.16	0.03	2.93	4.02	2.64	2.64			
Japan (Topix)	2,702.62	-0.29	3.12	6.09	14.37	14.37			
Emerging Markets									
MSCI EM Index	1,045.71	-0.64	2.66	6.91	1.90	1.90			
China (SSE Composite)	3,069.30	-0.18	7.10	10.07	3.17	3.17			
India (Sensex)	74,248.22	-0.04	2.00	2.96	2.27	2.27			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,271.82	-1.31	-0.84	0.05	6.67	6.67	44.57 KWD	1.82	18.82
Kuwait Premier Index	7,976.57	-1.39	-0.78	0.22	6.68	6.68	33.64 KWD	1.88	18.61
Kuwait Main Index	5,937.83	-0.87	-1.16	-0.59	6.61	6.61	10.93 KWD	1.63	19.56
Kuwait Sector									
Banking	1,761.27	-1.49	-0.93	0.28	6.91	6.91	27.10 KWD	1.35	19.61
Telecom	1,048.71	-1.25	-7.49	-11.91	-5.11	-5.11	3.21 KWD	1.28	8.41
Industrials	1,015.48	-1.66	-0.33	3.08	11.85	11.85	3.46 KWD	0.88	16.84
Financial services	1,343.82	-0.94	-0.60	-1.07	10.86	10.86	4.03 KWD	0.83	24.74
Real estate	1,300.90	-1.01	2.01	6.33	7.25	7.25	2.81 KWD	0.68	13.48
Basic materials	786.93	0.21	3.00	3.57	5.50	5.50	0.72 KWD	2.18	9.60
Health care	314.87	-3.87	-34.32	-34.74	-34.69	-34.69	0.16 KWD	1.06	9.97
Consumer services	801.44	-1.60	13.81	13.65	21.69	21.69	0.89 KWD	1.08	15.71
Insurance	2,564.45	-0.01	10.52	8.61	11.85	11.85	1.05 KWD	1.16	8.89
Consumer Disc	1,764.84	0.56	6.46	11.50	10.03	10.03	0.24 KWD	1.36	105.12
Energy	1,045.54	0.59	-3.00	2.21	10.17	10.17	0.22 KWD	0.74	4.72
Technology	1,906.05	0.00	-9.34	-5.41	229.56	229.56	0.03 KWD	2.22	0.00
Utilities	426.32	-4.71	-1.82	-4.71	-6.36	-6.36	0.18 KWD	1.48	14.15

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices have rallied to five-month highs and are on pace for a weekly gain as tensions boil in the Middle East with Israel closing embassies over threats from Iran. The West Texas Intermediate contract for May delivery rose 32 cents, or 0.37%, to \$86.91 a barrel, while the Brent June contract gained 52 cents, or 0.57%, to \$91.17 a barrel.

Kuwait Market

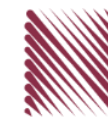
The market closed down by - 1.31% at 7,271.8 value traded 45.9 million KD, Premier market value reached 38.9 million KD down by - 1.39% at 7,976.6.

KSA Market

The market closed up + 1.2 % at 12,705.42

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



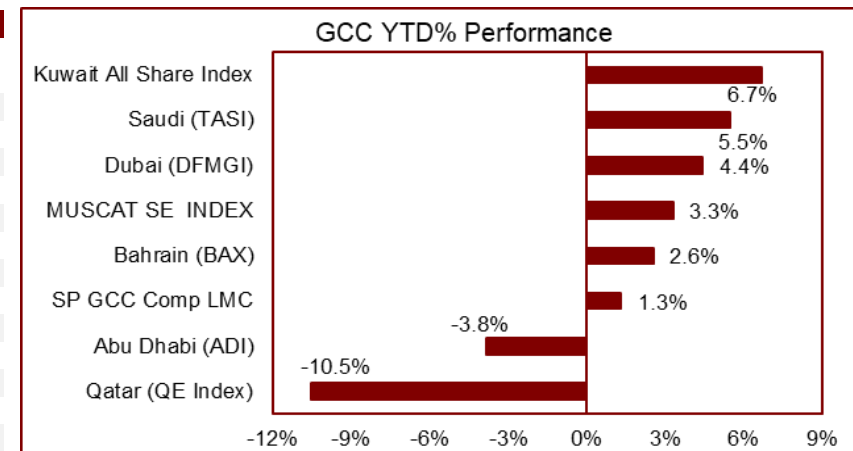
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.899	-1.97	-3.38	-3.67	5.59	5.59	7.49 KWD	1.82	27.00
KFH	0.728	-1.37	1.02	2.85	9.37	9.37	12.46 KWD	2.17	32.00
Zain	0.484	-1.63	-5.84	-7.98	-4.54	-4.54	2.09 KWD	1.68	9.72
BOUBYAN BANK	0.613	-0.65	-1.13	-0.16	2.17	2.17	2.43 KWD	2.42	34.00
Agility	0.609	-3.18	0.33	5.00	19.65	19.65	1.63 KWD	0.88	18.60
Saudi Arabia									
ARAMCO	30.45	-0.49	-4.69	-0.49	-7.73	-7.73	7,332.99 SAR	4.78	16.75
SABIC	86.10	3.73	8.99	10.53	3.11	3.11	265.21 SAR	1.58	35.00
STC	38.60	0.26	-7.32	-5.39	-4.46	-4.46	194.76 SAR	2.46	14.44
AL-RAJHI BANK	84.40	2.68	-5.91	0.48	-2.43	-2.43	338.02 SAR	3.17	20.81
NCB	40.80	2.00	-2.74	0.49	5.56	5.56	247.21 SAR	1.39	12.37
United Arab Emirates									
ETISALAT.AD	18.20	-0.55	-4.21	-5.11	-7.33	-7.33	206.60 AED	5.10	21.10
FAB.AD	13.24	-1.93	-9.19	-9.56	-5.16	-5.16	147.60 AED	1.18	9.39
EMIRATES NBD	17.35	-0.57	-4.67	-1.98	0.29	0.29	110.86 AED	1.01	5.16
DB ISLAMIC BK	5.77	-0.69	-11.64	-8.70	0.87	0.87	41.71 AED	0.93	6.53
EMAAR PROPERT	8.55	-0.35	4.52	15.07	7.95	7.95	75.13 AED	0.97	6.33
Qatar									
QNB	13.90	-1.84	-6.33	-10.38	-15.91	-15.91	130.29 QAR	1.19	9.07
INDUSTRIES QAT	12.33	1.23	2.58	2.75	-5.73	-5.73	76.69 QAR	1.92	16.24
QA ISLAMIC BK	18.20	-1.36	-11.05	-6.67	-15.35	-15.35	43.78 QAR	1.49	10.71
MASRAF AL RAYA	2.33	-0.81	-3.16	-0.81	-12.20	-12.20	22.14 QAR	0.90	15.74
MESAIEED PETRO	1.95	-1.02	12.72	16.07	9.06	9.06	24.48 QAR	1.43	22.60
OMAN									
BANK MUSCAT	0.263	-0.38	-2.59	-2.23	-0.38	-0.38	1.99 OMR	0.84	8.33
OMANTEL	1.054	18.69	-2.41	-2.41	-0.57	-0.57	0.79 OMR	1.24	7.69
BANK DHOFAR	0.160	0.00	6.67	6.67	0.00	0.00	0.48 QAR	0.65	14.93
NAT BANK OF OMAN	0.252	0.00	-6.67	-5.26	-10.00	-10.00	0.42 QAR	0.62	12.71
OMINVEST	0.429	2.14	-2.28	-4.67	2.14	2.14	0.28 QAR	0.92	6.85

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 down today by -1.31 %The leading sector bottom performance indices today are Utilities -4.71 % Health care -3.87 % Industrials -1.66 % respectively

KSA

Saudi Armco have negative performance today by -0.49 %, SABIC have positive performance today by + 3.7%. STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a positive performance today by + 2.68 %



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