



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, March 3, 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)	12,555.20	-0.60	-0.60	-0.60	4.91	4.91	2.45	21.96	2.90	11,131.05
Qatar (QE Index)	10,474.91	-0.12	1.67	3.82	-3.28	-3.28	1.24	12.40	4.49	539.63
Dubai (DFMGI)	4,356.61	1.11	3.09	1.11	7.31	7.31	1.46	8.46	5.23	618.04
Abu Dhabi (ADI)	9,278.91	0.26	-0.01	0.26	-3.12	-3.12	2.51	17.16	2.14	2,567.61
Bahrain (BAX)	2,009.03	0.18	0.18	0.18	1.90	1.90	0.79	10.46	4.74	7.35
Muscat SE INDEX	4,619.58	1.42	1.42	1.42	2.34	2.34	0.79	10.31	4.91	6.43
SP GCC Comp LMC	189.50	-0.54	-0.54	-0.51	2.46	2.46	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.89	0.00	0.00	0.29	-1.41	-1.41				
Developed Markets										
MSCI World Index	3,364.04	0.80	0.90	0.80	6.15	6.15				
U.S. (S&P 500)	5,137.08	0.80	0.95	0.80	7.70	7.70	4.30	25.48	1.76	45,411.06
U.K. (FTSE 100)	7,682.50	0.69	-0.31	0.69	-0.66	-0.66	1.63	12.44	3.88	2,035.20
Japan (topix)	2,709.42	1.26	1.83	1.26	14.50	14.50	1.60	15.14	2.01	971,177.70
Emerging Markets										
MSCI EM Index	1,024.68	0.37	-0.35	0.37	0.09	0.09				
China (SSE Composite)	3,027.02	0.39	0.74	0.39	1.75	1.75	1.36	12.00		44,025.04
India (Sensex)	73,806.15	0.08	0.91	1.80	2.17	2.17	4.73	23.37	1.12	146,831.47
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,438.86	-0.02	-0.02	-0.02	9.12	9.12	1.56	15.75	3.17	48.11
Kuwait Premier Index	8,155.70	-0.04	-0.04	-0.04	9.08	9.08	1.71	17.61	3.05	40.57
Kuwait Main Index	6,090.00	0.06	0.06	0.06	9.34	9.34	1.06	9.61	3.79	7.54
Kuwait Sector										
Banking	1,809.22	-0.05	-0.05	-0.05	9.82	9.82	1.83	17.95	2.80	30.51
Telecom	1,122.04	0.43	0.43	0.43	1.53	1.53	1.65	10.57	6.47	3.43
Industrials	1,014.84	-0.04	-0.04	-0.04	11.78	11.78	1.14	15.63	2.69	3.51
Financial Services	1,381.38	-0.42	-0.42	-0.42	13.95	13.95	1.12	13.70	3.39	4.42
Real Estate	1,285.19	0.44	0.44	0.44	5.96	5.96	0.97	14.68	1.80	2.75
Basic Materials	778.08	-0.26	-0.26	-0.26	4.31	4.31	1.36	11.30	10.02	0.44
Health Care	478.71	-1.54	-1.54	-1.54	-0.71	-0.71	1.76	12.17	1.71	0.24
Consumer Staples	710.73	-0.63	-0.63	-0.63	7.92	7.92	1.64	16.92	1.72	0.22
Insurance	2,521.46	0.02	0.02	0.02	9.97	9.97	1.40	8.57	3.70	1.02
Consumer Discretionary	1,664.42	-0.14	-0.14	-0.14	3.77	3.77				
Energy	1,053.34	1.85	1.85	1.85	10.99	10.99	0.79	10.42	4.87	0.22
Technology	2,037.00	0.36	0.36	0.36	252.20	252.20	2.50			0.03
Utilities	447.37	0.00	0.00	0.00	-1.73	-1.73				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

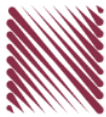
U.S. crude oil futures touched \$80 a barrel for the first time in nearly four months, as signs point to a tightening market ahead of an OPEC+ decision on production cuts. May Brent futures added 2.09%, or \$1.71, to \$83.94 a barrel.

Kuwait Market

The market closed down by - 0.02 % at 7,438.86 value traded 42.9 million KD, Premier market value reached 31.5 million KD up by + 0.35 % at 8,155.70

KSA Market

The market closed down by - 0.60 % at 12,555.20



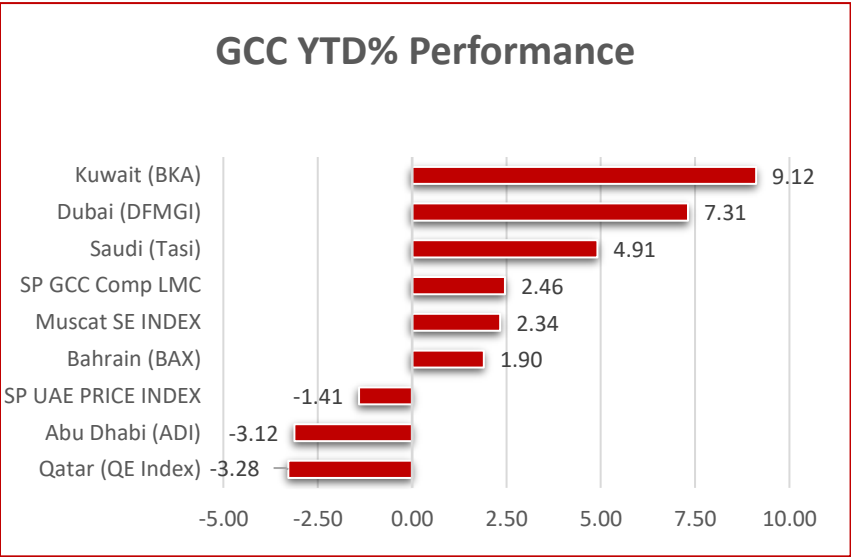
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.977	-0.31	-0.31	-0.31	9.28	9.28	1.79	14.38	3.58	7.73
KFH	0.810	0.00	0.00	0.00	11.57	11.57	2.03	21.06	2.47	12.73
ZAIN	0.509	1.19	1.19	1.19	0.39	0.39	1.77	10.18	6.88	2.21
BOUBYAN BANK	0.637	-0.93	-0.93	-0.93	6.17	6.17	2.51	33.96	1.26	2.52
AGILITY	0.604	0.50	0.50	0.50	18.66	18.66	0.87	18.31	0.00	1.62
Saudi Arabia										
ARAMCO	31.55	-0.47	-0.47	-0.47	-4.39	-4.39	4.94	16.06	4.80	7,635.10
SABIC	78.20	-0.76	-0.76	-0.76	-6.35	-6.35	1.35	76.28	4.35	234.60
STC	42.05	-0.94	-0.94	-0.94	4.08	4.08	2.65	15.81	3.80	210.25
AL-RAJHI BANK	87.70	-1.46	-1.46	-1.46	1.39	1.39	3.29	22.20	2.62	350.80
NCB	41.85	-1.18	-1.18	-1.18	8.28	8.28	1.41	12.95	3.10	251.10
Abu Dhabi										
ETISALAT.AD	18.22	0.66	-1.30	0.66	-7.23	-7.23	3.71	15.38	4.39	158.98
FAB.AD	13.70	0.44	-0.72	0.44	-1.86	-1.86	1.21	9.60	5.18	151.35
EMIRATES NBD	17.25	-5.74	-2.27	-5.74	-0.29	-0.29	0.99	5.19	6.96	109.91
DB ISLAMIC DB	6.48	0.62	1.57	0.62	13.29	13.29	1.05	7.35	6.94	46.99
EMAR.DU	8.29	2.09	3.24	2.09	4.67	4.67	0.98	7.65	3.02	73.27
Qatar										
QNB	15.23	1.20	1.60	-1.81	-7.86	-7.86	1.29	9.80	4.27	140.67
INDUSTREIS QAT	12.90	0.31	3.78	7.50	-1.38	-1.38	1.95	16.53	6.05	78.05
QA ISLAMIC BK	20.15	-0.05	-0.25	3.33	-6.28	-6.28	1.62	11.65	3.60	47.61
MASRAF AL RAYA	2.53	1.61	3.18	7.66	-4.71	-4.71	0.96	16.74	3.95	23.53
MESAIEED PETRO	1.89	0.27	6.66	12.50	5.70	5.70	1.39	21.93	4.55	23.74
Oman										
BANK MUSCAT	0.261	-0.38	-0.38	-0.38	-1.14	-1.14	0.83	10.34	5.75	1.95
OMANTEL	1.095	1.58	1.58	1.58	3.30	3.30	1.28	30.29	2.97	0.82
BANK DHOFAR	0.145	0.00	0.00	0.00	-9.38	-9.38	0.59	15.52	5.34	0.43
NAT BANK OF OMAN	0.252	0.00	0.00	0.00	-10.00	-10.00	0.61	9.04	3.37	0.41
OMINVEST	0.399	2.31	2.31	2.31	-5.00	-5.00	0.88	10.92	3.76	0.27

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
21-February-24	24.5%	14.75%	0.06%	2.71%	5.46%	17.92%	12.63%	6.27%	5.22%
28-February-24	24.53%	14.91%	0.06%	2.68%	5.51%	17.86%	12.68%	6.29%	5.23%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.02 %The leading sector bottom performance indices today are Health care -1.54 % Consumer services -0.63 % Financial services -0.42 % respectively

KSA

Saudi Armco had a negative performance today by – 0.47 %, SABIC had a negative performance today by – 0.76 %, STC had a negative performance today by - 0.94 %, Al Rajhi Bank had a negative performance today by – 1.46 %

U.A.E

ETISALAT.AD had a positive performance today by + 0.66 %, FAB.AD had a positive performance today by + 0.44 %



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