

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 3th June 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,808.3	1.58	2.65	2.65	-4.78	-1.33	2.25	19.97	3.29	10,309.72
Qatar (QE Index)	9,408.5	0.25	0.96	0.96	-4.45	-13.13	1.09	10.72	5.04	472.11
Dubai (DFMGI)	3,993.0	0.38	0.38	0.38	-5.96	-1.64	1.35	8.00	6.09	581.69
Abu Dhabi (ADI)	8,917.6	0.62	0.62	0.62	-3.36	-6.89	2.56	15.97	2.15	2,468.41
Bahrain (BAX)	2,037.2	0.18	-0.09	-0.09	-0.27	3.33	0.87	11.08	4.26	8.03
Muscat SE INDEX	4,821.4	-0.25	-0.50	-0.50	4.01	6.81	0.82	10.27	5.69	6.63
SP GCC Comp LMC	173.8	1.12	1.86	1.86	-6.27	-6.05	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	124.2	0.15	0.15	0.15	-7.75	-9.88				

Developed Markets

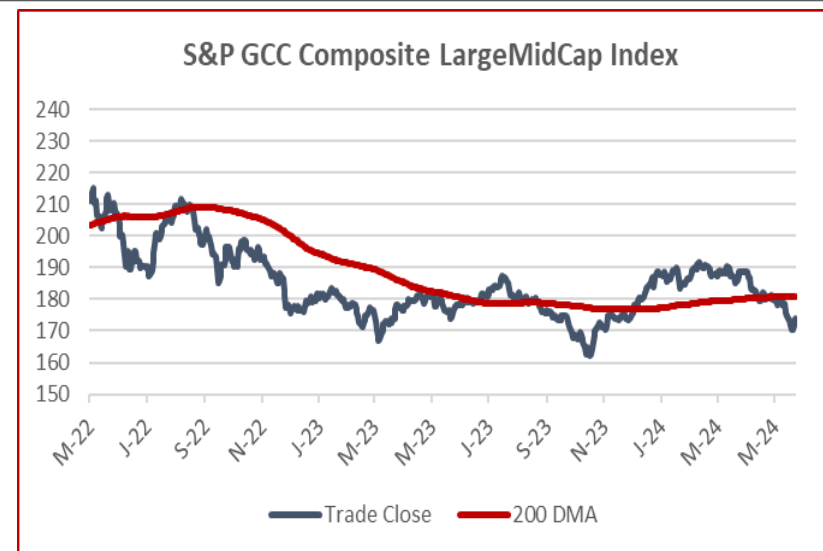
MSCI World Index	3,453.4	0.24	0.24	0.24	0.46	8.97				
U.S. (S&P 500)	5,283.4	0.11	0.11	0.11	0.55	10.77	4.38	25.74	1.66	46,625.89
U.K. (FTSE 100)	8,262.8	-0.15	-0.15	-0.15	3.90	6.85	1.77	14.81	3.69	2,163.82
Japan (topix)	2,798.1	0.92	0.92	0.92	1.06	18.24	1.46	15.53	2.07	983,646.76

Emerging Markets

MSCI EM Index	1,069.3	1.94	1.94	1.94	2.50	4.45				
China (SSE Composite)	3,078.5	-0.27	-0.27	-0.27	1.23	3.48	1.36	12.00		44,025.04
India (Sensex)	76,468.8	3.39	3.39	3.39	3.83	5.85	4.84	22.58	1.15	150,329.90

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,025.6	-0.57	-0.37	-0.37	-4.12	3.06	1.44	15.08	3.63	42.66
Kuwait Premier Index	7,637.5	-0.77	-0.59	-0.59	-4.97	2.15	1.57	16.53	3.45	35.05
Kuwait Main Index	5,997.3	0.40	0.67	0.67	0.20	7.68	1.04	10.20	4.54	7.61
Kuwait Sector										
Banking	1,729.0	-0.92	-0.72	-0.72	-2.40	4.95	1.73	17.32	3.04	26.13
Telecom	991.3	-0.30	-0.57	-0.57	-6.93	-10.30	1.46	11.85	8.45	3.04
Industrials	762.4	1.33	2.81	2.81	-27.06	-16.02	0.79	11.20	5.74	2.55
Financial Services	1,354.9	-0.12	-0.40	-0.40	0.10	11.77	1.08	11.84	2.97	4.64
Real Estate	1,324.8	-0.41	-0.12	-0.12	2.25	9.22	1.02	14.34	2.01	2.83
Basic Materials	839.3	-0.07	-0.12	-0.12	6.24	12.51	1.51	14.73	10.43	0.47
Health Care	445.9	0.00	0.00	0.00	29.78	-7.52	1.59	10.95	1.93	
Consumer Staples	889.5	-1.48	1.45	1.45	15.12	35.06	1.96	20.04	2.28	0.27
Insurance	2,527.4	0.06	0.67	0.67	-1.56	10.23	1.38	12.45	3.14	1.02
Consumer Discretionary	1,546.6	-0.98	-1.38	-1.38	-11.70	-3.57				
Energy	1,089.0	2.12	1.88	1.88	4.41	14.75	0.88	7.68	6.03	0.22
Technology	1,731.5	0.00	1.71	1.71	-9.16	199.37	2.14			0.02
Utilities	415.8	0.00	-0.63	-0.63	-6.51	-8.67				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell early on Monday, despite a move by producer group OPEC+ to extend deep output cuts well into 2025. Brent futures for August delivery were down 24 cents, or 0.3%, to \$80.87 a barrel.

Kuwait Market

The market closed down by – 0.57% at 7,025.6 value traded 50.8 million KD, Premier market value reached 37.1 million KD down by – 0.77% at 7,637.5.

KSA Market

The market closed up by + 1.58% at 11,808.3.

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	0.854	-0.70	-0.35	-0.35	-5.61	0.30	1.68	12.90	3.90	7.12
KFH	0.720	-1.23	-1.37	-1.37	-1.41	8.10	2.11	21.19	2.55	12.33
ZAIN	0.451	0.00	0.67	0.67	-8.52	-11.05	1.57	10.24	7.76	1.95
BOUBYAN BANK	0.579	-0.86	0.00	0.00	-0.69	2.29	2.44	30.90	1.30	2.43
AGILITY	0.296	0.34	1.02	1.02	-18.66	4.51	0.80	8.69	6.76	0.79
Saudi Arabia										
ARAMCO	28.90	1.58	-0.34	-0.34	-6.32	-12.42	4.59	15.94	6.48	6,993.61
SABIC	77.70	2.24	2.24	2.24	-0.77	-6.95	1.40	203.81	4.25	233.09
STC	36.90	2.07	2.50	2.50	-4.32	-6.22	2.29	13.69	4.34	184.50
AL-RAJHI BANK	78.10	3.31	2.63	2.63	-5.10	-9.71	2.89	19.47	2.94	312.39
NCB	35.20	2.18	3.99	3.99	-12.44	-8.93	1.16	10.87	4.97	211.19
Abu Dhabi										
ETISALAT.AD	15.96	-0.87	-0.87	-0.87	-13.07	-18.74	3.19	13.29	5.01	138.78
FAB.AD	11.90	2.59	2.59	2.59	-9.98	-14.76	1.10	8.27	5.97	131.45
EMIRATES NBD	15.70	0.96	0.96	0.96	-10.29	-9.25	0.92	4.57	7.64	99.15
DB ISLAMIC DB	5.53	0.18	0.18	0.18	-5.15	-3.32	0.93	6.16	8.14	40.03
EMAR.DU	7.51	-1.96	-1.96	-1.96	-8.08	-5.18	0.84	5.85	6.66	66.37
Qatar										
QNB	13.550	0.22	0.37	0.37	-4.78	-18.03	1.20	8.56	4.80	125.18
INDUSTREIS QAT	11.600	0.43	0.43	0.43	-2.93	-11.31	1.92	14.52	6.72	70.20
QA ISLAMIC BK	17.500	1.45	1.74	1.74	-4.63	-18.60	1.44	10.00	4.14	41.36
MASRAF AL RAYA	2.322	0.13	0.83	0.83	0.09	-12.54	0.90	15.13	4.31	21.60
MESAEED PETRO	1.688	-0.30	-1.86	-1.86	-14.92	-5.59	1.31	21.04	5.09	21.21
Oman										
BANK MUSCAT	0.255	-0.39	-1.54	-1.54	-2.67	-3.41	0.83	9.95	6.08	1.92
OMANTEL	1.062	0.00	0.47	0.47	3.11	0.19	1.30	11.99	5.65	0.80
BANK DHOFAR	0.157	0.00	0.00	0.00	-1.88	-1.88	0.65	15.58	4.94	0.47
NAT BANK OF OMAN	0.276	0.00	-1.43	-1.43	6.15	-1.43	0.66	9.66	3.08	0.45
OMINVEST	0.384	-0.26	-0.26	-0.26	4.62	-2.86	0.81	8.34	5.21	0.26

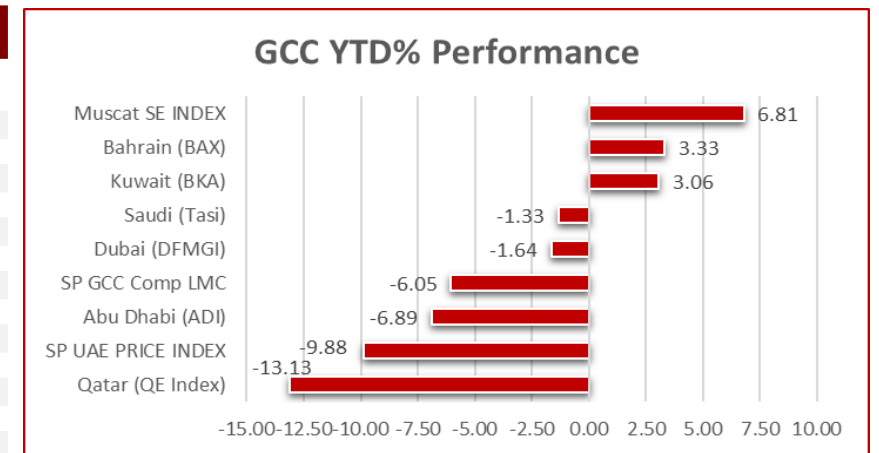
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Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
22-May-24	24.62%	14.79%	0.06%	2.32%	5.63%	17.74%	12.15%	6.25%	5.44%
29-May-24	24.58%	14.60%	0.06%	2.33%	5.84%	17.72%	12.17%	6.17%	5.43%

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 down today by -0.57 %The leading sector bottom performance indices today are Consumer services -1.48 % Consumer Disc -0.98 % Banking -0.92 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.58 %, SABIC have positive performance today by + 2.2%, STC has a positive performance today by + 2.07 %, Al Rajhi Bank has a positive performance today by + 3.31%.



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