



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, February 4, 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)	11,962.72	0.41	0.41	1.41	-0.04	-0.04	2.36	20.29	2.89	10,803.22
Qatar (QE Index)	10,040.49	-0.09	-0.09	-0.48	-7.30	-7.30	1.19	11.64	4.99	519.63
Dubai (DFMGI)	4,228.74	0.20	1.57	1.43	4.16	4.16	1.45	9.10	5.15	608.00
Abu Dhabi (ADI)	9,456.25	-0.14	-1.16	-0.55	-1.27	-1.27	2.90	17.27	2.03	2,669.58
Bahrain (BAX)	2,074.54	0.36	0.36	0.36	5.23	5.23	0.84	10.65	5.47	7.61
Muscat SE INDEX	4,559.93	-0.07	-0.07	-0.04	1.02	1.02	0.78	10.18	4.92	6.39
SP GCC Comp LMC	184.83	0.17	0.17	0.77	-0.06	-0.06	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.03	0.00	0.00	-0.37	-0.59	-0.59				
Developed Markets										
MSCI World Index	3,247.64	0.65	0.98	1.32	2.48	2.48				
U.S. (S&P 500)	4,958.61	1.07	1.38	2.33	3.96	3.96	4.36	25.02	1.84	43,900.43
U.K. (FTSE 100)	7,615.54	-0.09	-0.26	-0.20	-1.52	-1.52	1.60	10.69	3.91	2,018.33
Japan (topix)	2,539.68	0.22	1.68	-0.45	7.32	7.32	1.51	14.74	2.13	911,371.07
Emerging Markets										
MSCI EM Index	988.21	0.62	0.32	1.27	-3.47	-3.47				
China (SSE Composite)	2,730.15	-1.46	-6.19	-2.09	-8.23	-8.23	1.36	12.00		44,025.04
India (Sensex)	72,085.63	0.61	1.96	0.46	-0.21	-0.21	4.62	22.90	1.14	143,046.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,194.28	-0.61	-0.61	-1.02	5.53	5.53	1.52	15.08	3.12	46.87
Kuwait Premier Index	7,865.10	-0.67	-0.67	-1.19	5.19	5.19	1.68	16.72	2.97	37.47
Kuwait Main Index	5,949.29	-0.38	-0.38	-0.40	6.82	6.82	1.09	10.51	3.75	9.40
Kuwait Sector										
Banking	1,738.14	-0.71	-0.71	-1.03	5.50	5.50	1.76	17.02	2.64	29.61
Telecom	1,171.29	-0.88	-0.88	-1.61	5.99	5.99	1.79	10.67	5.98	3.63
Industrials	976.09	-0.15	-0.15	-0.92	7.51	7.51	1.09	15.02	2.91	3.38
Financial Services	1,337.10	-0.89	-0.89	-1.56	10.30	10.30	1.08	13.29	3.44	4.29
Real Estate	1,216.57	-0.53	-0.53	-0.57	0.30	0.30	0.95	14.43	2.00	2.63
Basic Materials	752.28	-0.66	-0.66	-0.99	0.85	0.85	1.32	10.97	10.32	0.43
Health Care	479.42	-0.63	-0.63	-0.63	-0.57	-0.57	1.75	12.11	1.72	0.24
Consumer Staples	706.57	-0.15	-0.15	0.19	7.29	7.29	1.62	15.16	1.74	0.22
Insurance	2,368.69	0.10	0.10	0.32	3.31	3.31	1.33	8.07	3.94	0.95
Consumer Discretionary	1,599.73	1.52	1.52	1.07	-0.26	-0.26				
Energy	1,007.53	1.49	1.49	-1.51	6.17	6.17	0.78	10.60	5.11	0.21
Technology	2,007.90	-0.72	-0.72	-0.36	247.17	247.17	2.50			0.03
Utilities	431.58	-1.80	-1.80	-3.53	-5.20	-5.20				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell by about 2% on Friday and posted weekly losses after U.S. jobs data shrank the odds of imminent interest rate cuts in the world's largest economy, which could dampen crude demand. Brent crude futures settled at \$77.33 a barrel, shedding \$1.37, or 1.7%.

Kuwait Market

The market closed down by – 0.61 % at 7,194.28 value traded 58.4 million KD, Premier market value reached 46.3 million KD down by – 0.67 % at 7,865.10

KSA Market

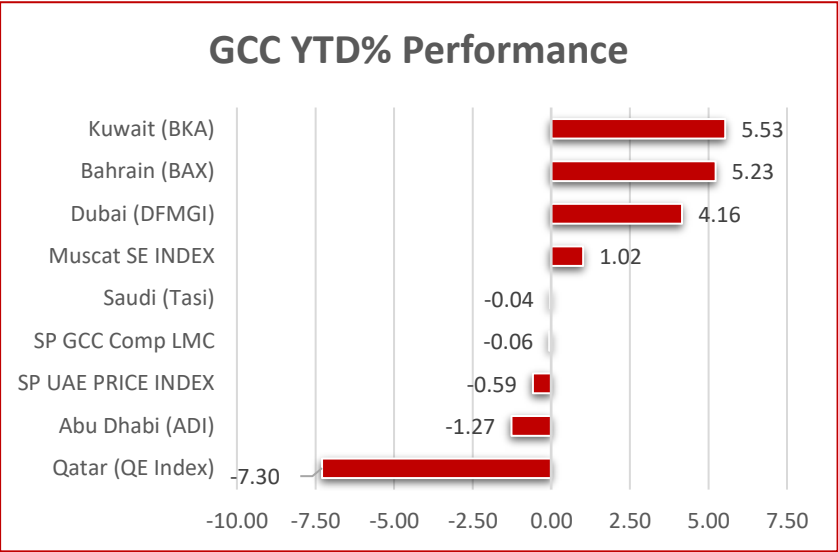
The market closed up by + 0.41 % at 11,962.72



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.966	-0.72	-0.72	-1.43	8.05	8.05	1.77	14.22	3.50	7.67
KFH	0.764	-0.78	-0.78	-1.04	5.23	5.23	1.91	19.86	2.20	11.29
ZAIN	0.515	-0.19	-0.19	-2.09	1.58	1.58	1.79	10.30	6.80	2.23
BOUBYAN BANK	0.613	-0.97	-0.97	-0.16	2.17	2.17	2.42	32.68	0.92	2.43
AGILITY	0.575	-0.17	-0.17	-0.86	12.97	12.97	0.83	17.43	0.00	1.54
Saudi Arabia										
ARAMCO	30.95	-0.16	-0.16	1.14	-6.21	-6.21	4.85	15.75	4.90	7,488.90
SABIC	78.60	0.26	0.26	0.90	-5.87	-5.87	1.36	76.67	4.33	235.77
STC	41.85	0.24	0.24	2.57	3.59	3.59	2.65	15.19	3.82	209.22
AL-RAJHI BANK	87.00	1.16	1.16	3.57	0.58	0.58	3.40	20.65	2.04	347.95
NCB	40.60	-1.34	-1.34	0.00	5.05	5.05	1.43	12.67	3.20	243.57
Abu Dhabi										
ETISALAT.AD	18.98	-1.56	-3.16	-1.04	-3.36	-3.36	4.03	15.95	4.21	165.06
FAB.AD	14.14	0.28	-5.35	-3.42	1.29	1.29	1.25	9.91	5.02	156.21
EMIRATES NBD	18.05	1.40	-0.28	1.98	4.34	4.34	1.04	5.43	6.65	114.01
DB ISLAMIC DB	6.38	-0.16	2.08	0.95	11.54	11.54	1.03	7.23	7.05	46.20
EMAR.DU	7.49	-0.66	0.27	0.81	-5.43	-5.43	0.89	6.91	3.34	66.20
Qatar										
QNB	15.48	-0.06	-0.06	-0.19	-6.35	-6.35	1.31	9.96	4.20	142.98
INDUSTREIS QAT	12.07	0.00	0.00	0.58	-7.72	-7.72	1.89	15.65	9.11	73.02
QA ISLAMIC BK	19.49	0.98	0.98	-0.05	-9.35	-9.35	1.57	11.27	3.72	46.05
MASRAF AL RAYA	2.29	-0.52	-0.52	-2.64	-13.82	-13.82	0.87	15.14	4.37	21.28
MESAIEED PETRO	1.66	0.00	0.00	-1.13	-7.10	-7.10	1.24	18.22	6.62	20.87
Oman										
BANK MUSCAT	0.270	0.00	0.00	0.37	2.27	2.27	0.86	10.70	5.56	2.02
OMANTEL	1.087	0.56	0.56	0.65	2.55	2.55	1.28	30.07	2.99	0.81
BANK DHOFAR	0.150	0.00	0.00	0.00	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.245	-5.77	-5.77	-7.89	-12.50	-12.50	0.60	8.84	3.47	0.40
OMINVEST	0.440	0.00	0.00	-2.22	4.76	4.76	0.97	12.04	3.41	0.29
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
24-January-24	24.35%	14.76%	0.06%	2.28%	0.19%	5.60%	17.69%	13.07%	6.20%	5.20%
31-January-24	24.37%	14.87%	0.06%	2.52%	0.19%	5.56%	17.79%	13.09%	6.24%	5.19%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is down today by -0.61 %The leading sector bottom performance indices today are Utilities -1.8 % Financial services -0.89 % Telecom -0.88 % respectively

KSA
Saudi Armco has a negative performance today by - 0.16 %, SABIC has a positive performance today by + 0.26 % . STC has a positive performance today by + 0.24 %, Al Rajhi Bank have positive performance today by + 1.16 %

U.A.E
ETISALAT .AD has a negative performance today by -1.56 %, FAB.AD has a positive performance today by + 0.28 %



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