



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday , March 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)	12,434.6	-0.96	-1.55	-1.55	3.90	3.90	2.42	21.80	2.93	11,020.45
Qatar (QE Index)	10,473.0	-0.02	-0.02	-0.02	-3.30	-3.30	1.24	12.40	4.49	539.03
Dubai (DFMGI)	4,326.6	-0.69	-0.69	0.41	6.57	6.57	1.46	8.46	5.23	615.30
Abu Dhabi (ADI)	9,285.6	0.07	0.07	0.33	-3.05	-3.05	2.51	17.18	2.14	2,569.68
Bahrain (BAX)	1,993.4	-0.78	-0.60	-0.60	1.11	1.11	0.79	10.42	4.75	7.29
Muscat SE INDEX	4,633.5	0.30	1.73	1.73	2.65	2.65	0.79	10.39	4.89	6.46
SP GCC Comp LMC	188.2	-0.69	-1.23	-1.19	1.75	1.75	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.2	0.23	0.23	0.52	-1.18	-1.18				
Developed Markets										
MSCI World Index	3,362.3	-0.05	-0.05	0.75	6.09	6.09				
U.S. (S&P 500)	5,137.1	0.80	0.95	0.80	7.70	7.70	4.30	25.45	1.76	45,351.02
U.K. (FTSE 100)	7,640.3	-0.55	-0.55	0.14	-1.20	-1.20	1.62	12.38	3.90	2,024.01
Japan (topix)	2,706.3	0.50	0.39	1.65	14.94	14.94	1.59	15.12	2.01	969,897.55
Emerging Markets										
MSCI EM Index	1,030.4	0.56	0.56	0.93	0.65	0.65				
China (SSE Composite)	3,039.3	0.28	0.69	1.08	2.45	2.45	1.36	12.00		44,025.04
India (Sensex)	73,872.3	0.09	0.09	1.89	2.26	2.26	4.74	23.40	1.11	147,091.99
Kuwait										
Kuwait All Share Index	7,432.5	-0.09	-0.11	-0.11	9.02	9.02	1.56	11.68	3.17	48.06
Kuwait Premier Index	8,150.3	-0.07	-0.11	-0.11	9.00	9.00	1.71	17.60	3.05	40.53
Kuwait Main Index	6,079.1	-0.18	-0.11	-0.11	9.15	9.15	1.06	3.86	3.79	7.53
Kuwait Sector										
Banking	1,808.6	-0.04	-0.09	-0.09	9.78	9.78	1.82	17.94	2.81	30.49
Telecom	1,123.3	0.11	0.54	0.54	1.64	1.64	1.66	10.63	6.43	3.45
Industrials	1,015.5	0.07	0.03	0.03	11.85	11.85	1.14	15.66	2.69	3.51
Financial Services	1,372.6	-0.63	-1.05	-1.05	13.23	13.23	1.10	13.54	3.37	4.37
Real Estate	1,282.8	-0.18	0.25	0.25	5.76	5.76	0.98	14.77	1.79	2.76
Basic Materials	778.0	-0.02	-0.27	-0.27	4.29	4.29	1.36	11.27	10.05	0.44
Health Care	478.7	0.00	-1.54	-1.54	-0.71	-0.71	1.74	11.98	1.74	0.24
Consumer Staples	710.0	-0.10	-0.72	-0.72	7.81	7.81	1.62	16.80	1.74	0.22
Insurance	2,531.0	0.38	0.40	0.40	10.39	10.39	1.41	8.61	3.69	1.02
Consumer Discretionary	1,658.8	-0.34	-0.47	-0.47	3.42	3.42				
Energy	1,050.5	-0.27	1.58	1.58	10.70	10.70	0.80	10.60	4.80	0.22
Technology	2,037.0	0.00	0.36	0.36	252.20	252.20	2.51			0.03
Utilities	444.7	-0.59	-0.59	-0.59	-2.31	-2.31				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell for a second day on Tuesday as pledges by China, the world's biggest crude importer, to transform its economy amid stuttering growth since the COVID pandemic failed to impress investors concerned about slower consumption. Brent futures for May fell 3 cents to \$82.77 a barrel.

Kuwait Market

The market closed down by - 0.09 % at 7,432.5 value traded 46.6 million KD, Premier market value reached 33.2 million KD down by - 0.07% at 8,150.3

KSA Market

The market closed down by - 0.96 % at 12,434.6



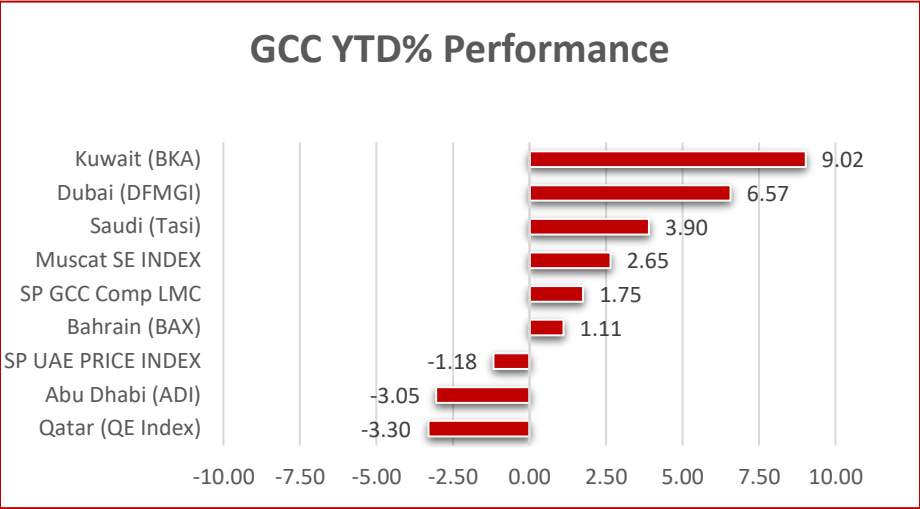
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.979	0.20	-0.10	-0.10	9.51	9.51	1.80	14.41	3.58	7.76
KFH	0.811	0.12	0.12	0.12	11.71	11.71	2.03	21.08	2.47	12.71
ZAIN	0.509	0.00	1.19	1.19	0.39	0.39	1.77	10.18	6.88	2.20
BOUBYAN BANK	0.631	-0.94	-1.87	-1.87	5.17	5.17	2.49	33.64	1.27	2.52
AGILITY	0.608	0.66	1.16	1.16	19.45	19.45	0.87	18.44	0.00	1.63
Saudi Arabia										
ARAMCO	31.20	-1.11	-1.58	-1.58	-5.45	-5.45	4.88	15.88	4.86	7,550.40
SABIC	77.70	-0.64	-1.40	-1.40	-6.95	-6.95	1.34	75.79	4.38	233.10
STC	41.10	-2.26	-3.18	-3.18	1.73	1.73	2.59	15.46	3.89	205.50
AL-RAJHI BANK	86.40	-1.48	-2.92	-2.92	-0.12	-0.12	3.24	21.87	2.66	345.60
NCB	40.50	-3.23	-4.37	-4.37	4.79	4.79	1.37	12.53	3.20	243.00
Abu Dhabi										
ETISALAT.AD	18.28	0.33	0.33	0.99	-6.92	-6.92	3.73	15.43	4.38	158.80
FAB.AD	13.70	0.00	0.00	0.44	-1.86	-1.86	1.21	9.60	5.18	151.57
EMIRATES NBD	17.40	0.87	0.87	-4.92	0.58	0.58	1.00	5.24	6.90	109.28
DB ISLAMIC DB	6.47	-0.15	-0.15	0.47	13.11	13.11	1.05	7.34	6.96	46.78
EMAR.DU	8.33	0.48	0.48	2.59	5.18	5.18	0.99	7.69	3.00	73.45
Qatar										
QNB	15.010	-1.44	-1.44	-1.44	-9.20	-9.20	1.27	9.65	4.33	139.01
INDUSTREIS QAT	12.920	0.16	0.16	0.16	-1.22	-1.22	1.96	16.56	6.04	78.05
QA ISLAMIC BK	19.900	-1.24	-1.24	-1.24	-7.44	-7.44	1.60	11.51	3.64	47.21
MASRAF AL RAYA	2.527	-0.12	-0.12	-0.12	-4.82	-4.82	0.96	16.72	3.96	23.50
MESAIEED PETRO	1.955	3.44	3.44	3.44	9.34	9.34	1.44	22.69	4.40	24.15
Oman										
BANK MUSCAT	0.264	1.15	0.76	0.76	0.00	0.00	0.84	10.46	5.68	1.98
OMANTEL	1.090	-0.46	1.11	1.11	2.83	2.83	1.28	30.15	2.98	0.82
BANK DHOFAR	0.145	0.00	0.00	0.00	-9.38	-9.38	0.59	15.52	5.34	0.44
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	0.00	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 -0.11 %The leading sector bottom performance indices today are Health care -1.54 % Financial services -1.05 % Consumer services -0.72 % respectively

KSA

Saudi Armco have negative performance today by -1.11 %, SABIC have negative performance today by -0.6 %. STC have negative performance today by -2.26 %, Al Rajhi Bank have negative performance today by -1.48 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.33 %, FAB.AD flat performance today 0 %



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