

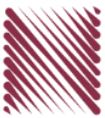


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , March 5, 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)	12,470.2	0.29	-1.27	-1.27	4.20	4.20	2.42	21.78	2.93	11,134.63
Qatar (QE Index)	10,384.6	-0.84	-0.86	-0.86	-4.12	-4.12	1.23	12.30	4.55	533.15
Dubai (DFMGI)	4,245.8	-1.87	-2.54	-1.46	4.58	4.58	1.43	8.29	5.34	604.26
Abu Dhabi (ADI)	9,236.3	-0.53	-0.46	-0.20	-3.57	-3.57	2.50	17.09	2.15	2,555.87
Bahrain (BAX)	2,014.6	1.06	0.46	0.46	2.19	2.19	0.80	10.51	4.71	7.37
Muscat SE INDEX	4,702.8	1.50	3.25	3.25	4.18	4.18	0.79	10.58	4.82	6.56
SP GCC Comp LMC	187.2	-0.55	-1.77	-1.74	1.19	1.19	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.3	-1.44	-1.21	-0.93	-2.60	-2.60				
Developed Markets										
MSCI World Index	3,337.2	-0.75	-0.80	0.00	5.30	5.30				
U.S. (S&P 500)	5,078.7	-1.02	-1.14	-0.35	6.47	6.47	4.30	25.45	1.76	45,351.02
U.K. (FTSE 100)	7,646.2	0.08	-0.47	0.21	-1.13	-1.13	1.63	12.39	3.89	2,025.05
Japan (topix)	2,719.9	0.50	0.39	1.65	14.94	14.94	1.60	15.20	2.00	974,603.69
Emerging Markets										
MSCI EM Index	1,021.7	-0.84	-0.29	0.08	-0.20	-0.20				
China (SSE Composite)	3,047.8	0.28	0.69	1.08	2.45	2.45	1.36	12.00		44,025.04
India (Sensex)	73,677.1	-0.26	-0.17	1.62	1.99	1.99	4.73	23.35	1.12	146,575.64
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,428.6	-0.05	-0.16	-0.16	8.97	8.97	1.56	11.68	3.17	48.06
Kuwait Premier Index	8,149.4	-0.01	-0.12	-0.12	8.99	8.99	1.71	17.60	3.05	40.53
Kuwait Main Index	6,062.9	-0.27	-0.38	-0.38	8.85	8.85	1.06	3.86	3.79	7.53
Kuwait Sector										
Banking	1,804.5	-0.23	-0.32	-0.32	9.53	9.53	1.82	17.94	2.81	30.49
Telecom	1,118.4	-0.43	0.11	0.11	1.20	1.20	1.66	10.63	6.43	3.45
Industrials	1,017.0	0.14	0.17	0.17	12.01	12.01	1.14	15.66	2.69	3.51
Financial Services	1,377.9	0.38	-0.67	-0.67	13.67	13.67	1.10	13.54	3.37	4.37
Real Estate	1,295.3	0.97	1.23	1.23	6.79	6.79	0.98	14.77	1.79	2.76
Basic Materials	780.9	0.38	0.11	0.11	4.69	4.69	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	713.1	0.44	-0.29	-0.29	8.28	8.28	1.62	16.80	1.74	0.22
Insurance	2,531.6	0.02	0.43	0.43	10.41	10.41	1.41	8.61	3.69	1.02
Consumer Discretionary	1,661.4	0.16	-0.32	-0.32	3.59	3.59				
Energy	1,051.6	0.10	1.67	1.67	10.81	10.81	0.80	10.60	4.80	0.22
Technology	1,971.5	-3.21	-2.87	-2.87	240.88	240.88	2.51			0.03
Utilities	447.4	0.59	0.00	0.00	-1.73	-1.73				

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 – 0.05 % at 7,428.6 value traded 44.8 million KD, Premier market value reached 32.3 million KD down by – 0.01% at 8,149.4

KSA Market

The market closed up by + 0.29 % at 12,470.2

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	0.978	-0.10	-0.20	-0.20	9.40	9.40	1.79	14.40	3.58	7.75
KFH	0.808	-0.37	-0.25	-0.25	11.29	11.29	2.02	21.00	2.48	12.65
ZAIN	0.508	-0.20	0.99	0.99	0.20	0.20	1.76	10.16	6.89	2.20
BOUBYAN BANK	0.628	-0.48	-2.33	-2.33	4.67	4.67	2.48	33.48	1.27	2.48
AGILITY	0.606	-0.33	0.83	0.83	19.06	19.06	0.87	18.37	0.00	1.62
Saudi Arabia										
ARAMCO	31.65	1.44	-0.16	-0.16	-4.09	-4.09	4.96	16.11	4.79	7,659.50
SABIC	77.80	0.13	-1.27	-1.27	-6.83	-6.83	1.34	75.89	4.37	233.41
STC	40.55	-1.34	-4.48	-4.48	0.37	0.37	2.56	15.25	3.95	202.76
AL-RAJHI BANK	85.90	-0.58	-3.48	-3.48	-0.69	-0.69	3.22	21.75	2.68	343.61
NCB	39.80	-1.73	-6.02	-6.02	2.98	2.98	1.34	12.31	3.26	238.81
Abu Dhabi										
ETISALAT.AD	18.02	-1.42	-1.10	-0.44	-8.25	-8.25	3.67	15.21	4.44	156.89
FAB.AD	13.36	-2.48	-2.48	-2.05	-4.30	-4.30	1.18	9.36	5.31	150.47
EMIRATES NBD	17.05	-2.01	-1.16	-6.83	-1.45	-1.45	0.98	5.13	7.04	107.70
DB ISLAMIC DB	6.35	-1.85	-2.01	-1.40	11.01	11.01	1.03	7.20	7.09	45.98
EMAR.DU	8.08	-3.00	-2.53	-0.49	2.02	2.02	0.96	7.46	3.09	71.59
Qatar										
QNB	14.740	-1.80	-3.22	-3.22	-10.83	-10.83	1.25	9.48	4.41	135.78
INDUSTREIS QAT	12.650	-2.09	-1.94	-1.94	-3.29	-3.29	1.92	16.21	6.17	76.65
QA ISLAMIC BK	19.800	-0.50	-1.74	-1.74	-7.91	-7.91	1.59	11.45	3.66	46.64
MASRAF AL RAYA	2.500	-1.07	-1.19	-1.19	-5.84	-5.84	0.95	16.54	4.00	23.22
MESAIEED PETRO	1.946	-0.46	2.96	2.96	8.84	8.84	1.43	22.58	4.42	23.00
Oman										
BANK MUSCAT	0.269	1.89	2.67	2.67	1.89	1.89	0.86	10.66	5.58	2.02
OMANTEL	1.090	0.00	1.11	1.11	2.83	2.83	1.28	30.15	2.98	0.83
BANK DHOFAR	0.150	3.45	3.45	3.45	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.256	1.59	1.59	1.59	-8.57	-8.57	0.62	9.19	3.32	0.42
OMINVEST	0.395	-1.00	1.28	1.28	-5.95	-5.95	0.87	10.81	3.80	0.26

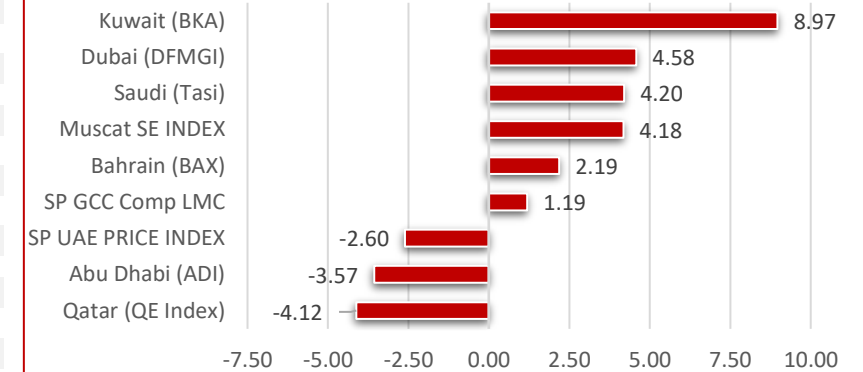
Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
21-February-24	24.5%	14.75%	0.06%	2.71%	5.46%	17.92%	12.63%	6.27%	5.22%
28-February-24	24.53%	14.91%	0.06%	2.68%	5.51%	17.86%	12.68%	6.29%	5.23%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by - 0.05 % The leading sector bottom performance indices today are Technology - 3.21 % Telecom - 0.43 % Banking-0.23 % respectively

KSA

Saudi Armco has a positive performance today by + 1.44 %, SABIC has a positive performance today by + 0.13 %. STC has a negative performance today by - 1.34 %, Al Rajhi Bank has a negative performance today by - 0.58 %

U.A.E

ETISALAT .AD has a negative performance today by - 1.42 %, FAB.AD has a negative performance today - 2.48 %



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