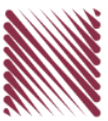


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 6th June 2024





Wednesday, June 5, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,553.2	-0.51	0.43	0.43	-6.84	-3.46	2.22	19.74	3.36	10,078.73
Qatar (QE Index)	9,491.5	0.29	1.85	1.85	-3.61	-12.36	1.10	10.81	5.00	475.94
Dubai (DFMGI)	3,980.3	-0.14	0.06	0.06	-6.26	-1.96	1.35	7.99	6.10	581.64
Abu Dhabi (ADI)	8,948.1	0.33	0.96	0.96	-3.03	-6.58	2.57	16.02	2.15	2,477.60
Bahrain (BAX)	2,037.9	-0.18	-0.06	-0.06	-0.23	3.37	0.87	11.06	4.26	8.04
Muscat SE INDEX	4,778.7	-0.09	-1.38	-1.38	3.08	5.86	0.82	10.20	5.73	6.58
SP GCC Comp LMC	171.8	-0.30	0.74	0.74	-7.31	-7.08	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	123.9	-0.42	-0.10	-0.10	-7.97	-10.10				
Developed Markets										
MSCI World Index	3,483.4	0.86	1.11	1.11	1.33	9.91				
U.S. (S&P 500)	5,354.0	1.18	1.45	1.45	1.90	12.25	4.39	26.41	1.65	46,767.56
U.K. (FTSE 100)	8,247.0	0.18	-0.34	-0.34	3.70	6.64	1.76	14.78	3.69	2,158.14
Japan (topix)	2,748.2	-1.41	-0.88	-0.88	-0.74	16.14	1.43	15.24	2.10	967,348.12
Emerging Markets										
MSCI EM Index	1,062.8	1.03	1.32	1.32	1.88	3.81				
China (SSE Composite)	3,065.4	-0.83	-0.69	-0.69	0.80	3.04	1.36	12.00		44,025.04
India (Sensex)	74,382.2	3.20	0.57	0.57	0.99	2.97	4.68	21.96	1.19	146,592.81
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,049.0	0.14	-0.04	-0.04	-3.80	3.40	1.44	15.03	3.64	42.19
Kuwait Premier Index	7,667.6	0.20	-0.20	-0.20	-4.59	2.55	1.56	16.43	3.46	34.84
Kuwait Main Index	6,000.1	-0.14	0.71	0.71	0.24	7.73	1.04	10.30	4.52	7.34
Kuwait Sector										
Banking	1,736.0	0.09	-0.33	-0.33	-2.01	5.37	1.72	17.22	3.06	25.97
Telecom	987.6	0.33	-0.94	-0.94	-7.27	-10.63	1.44	11.74	8.54	3.01
Industrials	764.1	0.26	3.04	3.04	-26.90	-15.84	0.80	11.33	5.67	2.58
Financial Services	1,358.0	-0.26	-0.17	-0.17	0.33	12.03	1.08	11.99	2.95	4.34
Real Estate	1,328.1	0.46	0.13	0.13	2.50	9.50	1.01	14.23	2.03	2.81
Basic Materials	840.3	-0.60	0.01	0.01	6.37	12.65	1.52	14.82	10.36	0.48
Health Care	430.7	-3.41	-3.41	-3.41	25.35	-10.67	1.59	10.95	1.93	
Consumer Staples	875.1	1.84	-0.19	-0.19	13.26	32.88	1.86	19.07	2.39	0.26
Insurance	2,544.9	-0.20	1.37	1.37	-0.88	11.00	1.39	12.55	3.11	1.03
Consumer Discretionary	1,576.6	1.82	0.53	0.53	-9.99	-1.70				
Energy	1,129.9	2.21	5.70	5.70	8.33	19.06	0.91	7.98	5.90	0.23
Technology	1,709.6	0.43	0.43	0.43	-10.31	195.60	2.10			0.02
Utilities	418.4	0.00	0.00	0.00	-5.92	-8.09				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Crude oil futures rose more than 1% on Wednesday, bouncing back from four-month lows after a decision by OPEC+ to increase production triggered a selloff this week. U.S. crude and global benchmark Brent are down nearly 4% this week after eight OPEC+ members agreed Sunday to gradually phase out 2.2 million barrels per day in production cuts.

Kuwait Market

The market closed up by 0.14% at 7,049.0 value traded 57.5 million KD, Premier market value reached 41.7 million KD up by 0.20% at 7,667.6.

KSA Market

The market closed down by - 0.51% at 11,553.2.

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	0.860	0.23	0.35	0.35	-4.95	1.01	1.69	12.99	3.88	7.18
KFH	0.724	0.28	-0.82	-0.82	-0.86	8.70	2.12	21.31	2.53	12.43
ZAIN	0.450	0.45	0.45	0.45	-8.72	-11.24	1.57	10.22	7.78	1.96
BOUBYAN BANK	0.579	-0.17	0.00	0.00	-0.69	2.29	2.44	30.90	1.30	2.44
AGILITY	0.294	-0.34	0.34	0.34	-19.21	3.81	0.79	8.63	6.80	0.79
Saudi Arabia										
ARAMCO	28.20	0.00	-2.76	-2.76	-8.59	-14.55	4.48	15.55	6.64	6,824.40
SABIC	75.10	-1.18	-1.18	-1.18	-4.09	-10.06	1.35	196.99	4.39	225.30
STC	36.50	-0.41	1.39	1.39	-5.36	-7.23	2.26	13.55	4.38	182.50
AL-RAJHI BANK	77.80	0.13	2.23	2.23	-5.47	-10.06	2.87	19.39	2.96	311.20
NCB	34.90	0.87	3.10	3.10	-13.18	-9.70	1.15	10.78	5.01	209.40
Abu Dhabi										
ETISALAT.AD	15.80	-2.83	-1.86	-1.86	-13.94	-19.55	3.15	13.15	5.06	137.73
FAB.AD	11.86	-0.17	2.24	2.24	-10.29	-15.04	1.10	8.24	5.99	131.22
EMIRATES NBD	15.90	0.63	2.25	2.25	-9.14	-8.09	0.93	4.63	7.55	100.42
DB ISLAMIC DB	5.50	-0.36	-0.36	-0.36	-5.66	-3.85	0.93	6.13	8.18	39.82
EMAR.DU	7.50	0.94	-2.09	-2.09	-8.20	-5.30	0.84	5.84	6.67	66.28
Qatar										
QNB	13.630	0.22	0.96	0.96	-4.22	-17.54	1.21	8.61	4.77	125.93
INDUSTREIS QAT	11.880	1.89	2.86	2.86	-0.59	-9.17	1.97	14.87	6.57	71.83
QA ISLAMIC BK	17.550	0.29	2.03	2.03	-4.36	-18.37	1.45	10.03	4.13	41.48
MASRAF AL RAYA	2.322	-0.34	0.83	0.83	0.09	-12.54	0.90	15.13	4.31	21.60
MESAEED PETRO	1.690	0.60	-1.74	-1.74	-14.82	-5.48	1.31	21.06	5.09	21.23
Oman										
BANK MUSCAT	0.255	0.00	-1.54	-1.54	-2.67	-3.41	0.83	9.95	6.08	1.91
OMANTEL	1.060	-0.19	0.28	0.28	2.91	0.00	1.29	11.97	5.66	0.79
BANK DHOFAR	0.153	0.00	-2.55	-2.55	-4.38	-4.38	0.64	15.18	5.07	0.46
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	0.380	-1.04	-1.30	-1.30	3.53	-3.87	0.80	8.26	5.26	0.25

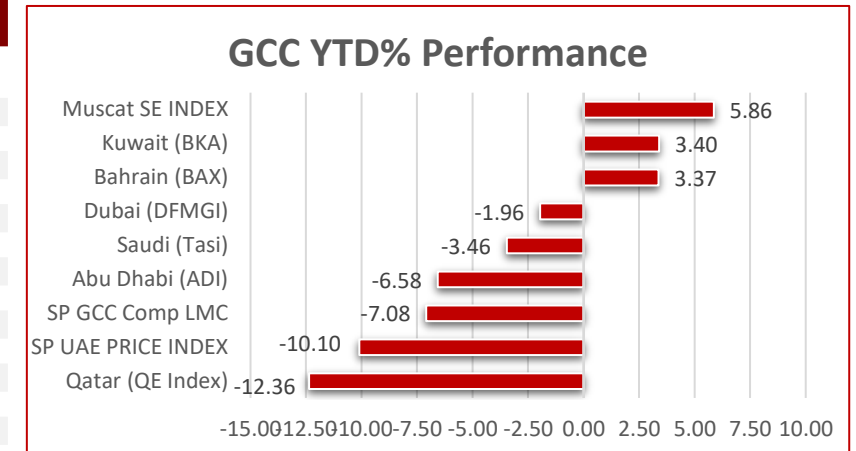
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
29-May-24	24.58%	14.60%	0.06%	2.33%	5.84%	17.72%	12.17%	6.17%	5.43%
05-June-24	24.52%	14.12%	0.06%	2.34%	6.02%	17.73%	13.10%	6.11%	5.54%

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 up today by + 0.14 %The leading sector best performance indices today are Energy 2.21 % Consumer services 1.84 % Consumer Disc 1.82 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 1.18%. STC have negative performance today by -0.41 %, Al Rajhi Bank has a positive performance today by + 0.13 %



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