



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday , March 6, 2024





Wednesday, March 6, 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)	12,561.9	0.74	-0.55	-0.55	4.97	4.97	2.43	22.01	2.91	11,175.29
Qatar (QE Index)	10,303.5	-0.78	-1.64	-1.64	-4.87	-4.87	1.22	12.20	4.59	528.75
Dubai (DFMGI)	4,248.3	0.06	-2.49	-1.40	4.64	4.64	1.43	8.31	5.40	605.69
Abu Dhabi (ADI)	9,225.2	-0.12	-0.58	-0.32	-3.68	-3.68	2.50	17.06	2.16	2,554.62
Bahrain (BAX)	2,015.6	0.05	0.51	0.51	2.24	2.24	0.80	10.52	4.71	7.38
Muscat SE INDEX	4,753.2	1.07	4.36	4.36	5.30	5.30	0.80	10.64	5.41	6.59
SP GCC Comp LMC	187.9	0.38	-1.40	-1.37	1.57	1.57	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.9	-0.27	-1.47	-1.19	-2.86	-2.86				
Developed Markets										
MSCI World Index	3,357.0	0.59	-0.21	0.59	5.93	5.93				
U.S. (S&P 500)	5,104.8	0.51	-0.63	0.17	7.02	7.02	4.27	25.31	1.77	45,113.69
U.K. (FTSE 100)	7,679.3	0.43	-0.04	0.65	-0.70	-0.70	1.63	12.53	3.88	2,033.43
Japan (topix)	2,730.7	-0.44	0.34	1.60	14.88	14.88	1.61	15.26	1.99	978,673.09
Emerging Markets										
MSCI EM Index	1,028.0	0.61	0.32	0.69	0.41	0.41				
China (SSE Composite)	3,039.9	-0.41	0.01	0.41	1.76	1.76	1.36	12.00		44,025.04
India (Sensex)	74,086.0	0.55	0.38	2.19	2.55	2.55	4.76	23.48	1.11	147,350.11

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,400.5	-0.38	-0.54	-0.54	8.55	8.55	1.56	11.67	3.19	47.87
Kuwait Premier Index	8,109.0	-0.50	-0.61	-0.61	8.45	8.45	1.70	17.50	3.08	40.34
Kuwait Main Index	6,076.1	0.22	-0.16	-0.16	9.09	9.09	1.06	3.89	3.79	7.52
Kuwait Sector										
Banking	1,794.3	-0.56	-0.88	-0.88	8.91	8.91	1.81	17.81	2.84	30.27
Telecom	1,114.3	-0.37	-0.26	-0.26	0.83	0.83	1.65	10.54	6.48	3.42
Industrials	1,014.7	-0.23	-0.06	-0.06	11.76	11.76	1.14	15.64	2.69	3.51
Financial Services	1,381.4	0.25	-0.42	-0.42	13.96	13.96	1.12	13.40	3.35	4.40
Real Estate	1,292.9	-0.18	1.05	1.05	6.60	6.60	0.98	14.93	1.78	2.78
Basic Materials	778.6	-0.30	-0.19	-0.19	4.38	4.38	1.36	11.28	10.04	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	715.2	0.29	0.00	0.00	8.60	8.60	1.64	16.92	1.72	0.22
Insurance	2,534.0	0.09	0.52	0.52	10.52	10.52	1.39	9.98	3.69	1.02
Consumer Discretionary	1,658.0	-0.21	-0.52	-0.52	3.37	3.37				
Energy	1,046.3	-0.50	1.16	1.16	10.25	10.25	0.80	10.57	4.81	0.22
Technology	1,993.4	1.11	-1.79	-1.79	244.66	244.66	2.46			0.03
Utilities	450.0	0.59	0.59	0.59	-1.16	-1.16				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell slightly on Wednesday as concerns about demand growth in China, the world's biggest crude importer, clashed with signs of supply tightness amid output cuts by major producers, Brent crude futures fell 13 cents to \$81.91 a barrel.

Kuwait Market

The market closed down by – 0.38 % at 7,400.5 value traded 47.1 million KD, Premier market value reached 33.6 million KD down by – 0.50% at 8,109.0

KSA Market

The market closed up by + 0.74 % at 12,561.9

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	0.968	-1.02	-1.22	-1.22	8.28	8.28	1.78	14.25	3.62	7.65
KFH	0.805	-0.37	-0.62	-0.62	10.88	10.88	2.01	20.93	2.48	12.62
ZAIN	0.504	-0.79	0.20	0.20	-0.59	-0.59	1.75	10.08	6.94	2.19
BOUBYAN BANK	0.627	-0.16	-2.49	-2.49	4.50	4.50	2.47	33.42	1.28	2.48
AGILITY	0.601	-0.83	0.00	0.00	18.07	18.07	0.86	18.22	0.00	1.61
Saudi Arabia										
ARAMCO	31.70	0.16	0.00	0.00	-3.94	-3.94	4.96	16.14	4.78	7,671.60
SABIC	78.90	1.41	0.13	0.13	-5.51	-5.51	1.36	75.54	4.31	236.71
STC	41.35	1.97	-2.59	-2.59	2.35	2.35	2.61	15.55	3.87	206.76
AL-RAJHI BANK	86.40	0.58	-2.92	-2.92	-0.12	-0.12	3.24	21.87	2.66	345.61
NCB	40.00	0.50	-5.55	-5.55	3.49	3.49	1.35	12.38	3.24	240.01
Abu Dhabi										
ETISALAT.AD	17.66	-2.00	-3.07	-2.43	-10.08	-10.08	3.60	14.90	4.53	153.59
FAB.AD	13.40	0.30	-2.19	-1.76	-4.01	-4.01	1.18	9.39	5.30	148.04
EMIRATES NBD	17.05	0.00	-1.16	-6.83	-1.45	-1.45	0.98	5.13	7.04	107.38
DB ISLAMIC DB	6.34	-0.16	-2.16	-1.55	10.84	10.84	1.03	7.19	7.10	42.72
EMAR.DU	8.13	0.62	-1.93	0.12	2.65	2.65	0.97	7.50	3.08	71.42
Qatar										
QNB	14.620	-0.81	-4.01	-4.01	-11.55	-11.55	1.24	9.40	4.45	135.22
INDUSTREIS QAT	12.710	0.47	-1.47	-1.47	-2.83	-2.83	1.92	16.29	6.14	71.93
QA ISLAMIC BK	19.800	0.00	-1.74	-1.74	-7.91	-7.91	1.59	11.45	3.66	46.64
MASRAF AL RAYA	2.501	0.04	-1.15	-1.15	-5.80	-5.80	0.95	16.55	4.00	23.25
MESAIEED PETRO	1.844	-5.24	-2.43	-2.43	3.13	3.13	1.36	21.40	4.66	22.98
Oman										
BANK MUSCAT	0.267	-0.74	1.91	1.91	1.14	1.14	0.85	10.58	5.62	2.00
OMANTEL	1.095	0.46	1.58	1.58	3.30	3.30	1.28	30.29	2.97	0.82
BANK DHOFAR	0.150	0.00	3.45	3.45	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.260	1.56	3.17	3.17	-7.14	-7.14	0.63	9.33	3.27	0.42
OMINVEST	0.395	0.00	1.28	1.28	-5.95	-5.95	0.87	10.81	3.80	0.26

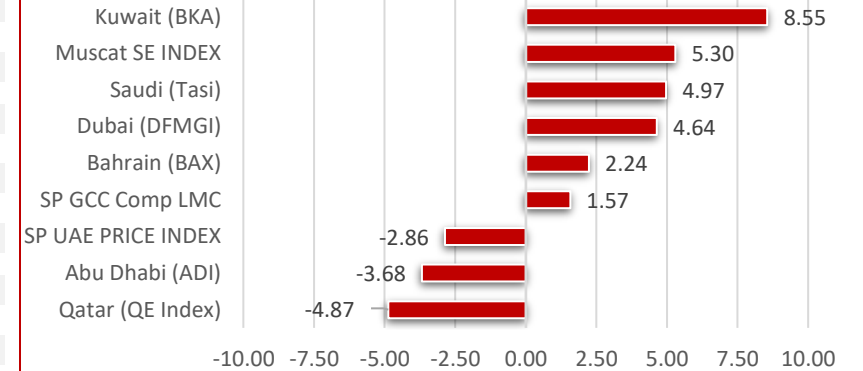
Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
21-February-24	24.5%	14.75%	0.06%	2.71%	5.46%	17.92%	12.63%	6.27%	5.22%
28-February-24	24.53%	14.91%	0.06%	2.68%	5.51%	17.86%	12.68%	6.29%	5.23%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by – 0.38 % The leading sector bottom performance indices today are Banking – 0.56 % Energy - 0.50 % Telecom -0.37 % respectively

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC has a positive performance today by + 1.41 %. STC has a positive performance today by + 1.97 %, Al Rajhi Bank has a positive performance today by + 0.58 %

U.A.E

ETISALAT .AD has a negative performance today by – 2.0 %, FAB.AD has a positive performance today + 0.30 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw