

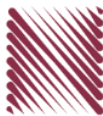


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , 7th April 2024





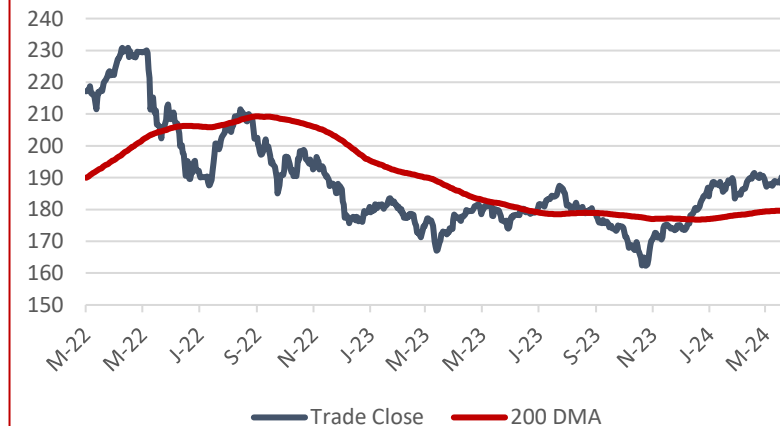
Sunday, April 7, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,705.4	0.66	1.11	2.45	2.45	6.17	2.43	21.75	2.98	10,925.35
Qatar (QE Index)	9,910.2	0.96	0.96	0.64	0.64	-8.50	1.15	11.38	4.79	498.96
Dubai (DFMGI)	4,244.2	-0.06	-0.05	-0.05	-0.05	4.54	1.38	8.32	5.70	604.55
Abu Dhabi (ADI)	9,237.3	-0.02	0.10	0.10	0.10	-3.56	2.62	17.37	2.07	2,608.66
Bahrain (BAX)	2,020.9	-0.03	-0.03	-1.07	-1.07	2.51	0.87	10.56	4.30	8.13
Muscat SE INDEX	4,689.4	0.19	0.19	1.16	1.16	3.88	0.78	10.28	5.55	6.55
SP GCC Comp LMC	188.5	-0.07	-0.07	1.68	1.68	1.93	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.4	0.00	0.00	0.54	0.54	-1.78				
Developed Markets										
MSCI World Index	3,402.4	0.47	-1.03	-1.03	-1.03	7.36				
U.S. (S&P 500)	5,204.3	1.11	-0.95	-0.95	-0.95	9.11	4.34	25.83	1.74	46,098.50
U.K. (FTSE 100)	7,911.2	-0.81	-0.52	-0.52	-0.52	2.30	1.70	13.04	3.76	2,094.03
Japan (topix)	2,702.6	-1.08	-2.38	-2.38	-2.38	14.21	1.59	15.08	2.01	964,207.19
Emerging Markets										
MSCI EM Index	1,045.7	-0.29	0.24	0.24	0.24	2.15				
China (SSE Composite)	3,069.3	-0.18	0.92	0.92	0.92	3.17	1.36	12.00		44,025.04
India (Sensex)	74,248.2	0.03	0.81	0.81	0.81	2.78	4.81	23.67	1.11	147,170.94

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,195.5	-1.05	-1.05	-1.80	-1.80	5.55	1.48	9.07	3.43	43.82
Kuwait Premier Index	7,873.0	-1.30	-1.30	-2.04	-2.04	5.30	1.62	16.95	3.20	36.35
Kuwait Main Index	5,950.9	0.22	0.22	-0.58	-0.58	6.84	1.03	2.51	4.61	7.47
Kuwait Sector										
Banking	1,736.5	-1.41	-1.41	-1.98	-1.98	5.40	1.75	17.36	2.92	26.38
Telecom	1,055.0	0.60	0.60	-0.95	-0.95	-4.54	1.53	9.95	8.02	3.20
Industrials	999.1	-1.61	-1.61	-4.42	-4.42	10.05	1.07	16.05	3.47	3.47
Financial Services	1,330.0	-1.03	-1.03	-1.74	-1.74	9.72	1.07	1.74	3.57	4.50
Real Estate	1,294.5	-0.49	-0.49	-0.09	-0.09	6.73	0.99	13.70	1.95	2.77
Basic Materials	786.9	0.00	0.00	-0.38	-0.38	5.50	1.35	10.98	9.93	0.44
Health Care	308.5	-2.01	-2.01	-10.20	-10.20	-36.01	1.12	7.90	2.73	
Consumer Staples	804.2	0.34	0.34	4.08	4.08	22.11	1.74	20.91	1.54	0.24
Insurance	2,577.0	0.49	0.49	0.38	0.38	12.40	1.40	13.56	3.21	1.03
Consumer Discretionary	1,773.8	0.51	0.51	1.26	1.26	10.59				
Energy	1,047.0	0.14	0.14	0.39	0.39	10.33	0.81	10.06	4.82	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	421.1	-1.24	-1.24	-5.33	-5.33	-7.51				

* Price performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell more than \$1 a barrel on Monday, with Brent sliding under \$90, as Middle East tensions eased after Israel withdrew more soldiers from southern Gaza and committed to fresh talks on a potential ceasefire in the six-month conflict. Brent crude futures slipped \$1.70, or 1.9%, to \$89.47 a barrel.

Kuwait Market

The market closed down by – 1.05% at 7,195.5 value traded 31.7 million KD, Premier market value reached 27.9 million KD down by – 1.3% at 7,873.

KSA Market

Eid Al Fiter Holiday for the Saudi Exchange Trading.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.878	-2.34	-2.34	-2.96	-2.96	3.12	1.78	14.25	3.80	7.31
KFH	0.717	-1.57	-1.57	-1.82	-1.82	7.65	2.13	20.64	2.56	12.27
ZAIN	0.489	1.03	1.03	-0.81	-0.81	-3.55	1.70	9.82	7.16	2.12
BOUBYAN BANK	0.614	0.16	0.16	-0.65	-0.65	2.33	2.42	32.73	1.30	2.43
AGILITY	0.591	-2.96	-2.96	-9.63	-9.63	16.11	0.85	18.05	1.69	1.58
Saudi Arabia										
ARAMCO	30.30	-0.49	-1.46	-1.78	-1.78	-8.18	4.78	16.19	5.59	7,332.60
SABIC	88.40	2.67	13.19	12.90	12.90	5.87	1.58	203.27	3.85	265.20
STC	38.95	0.91	-1.64	-1.64	-1.64	-3.59	2.46	14.65	4.11	194.75
AL-RAJHI BANK	84.50	0.12	1.68	2.67	2.67	-2.31	3.17	21.39	2.72	338.00
NCB	41.20	0.98	0.98	2.49	2.49	6.60	1.39	12.75	4.25	247.20
Abu Dhabi										
ETISALAT.AD	18.38	0.00	0.11	0.11	0.11	-6.42	3.75	15.51	4.35	159.85
FAB.AD	13.36	-0.30	1.06	1.06	1.06	-4.30	1.18	9.36	5.31	147.60
EMIRATES NBD	17.55	2.33	0.29	0.29	0.29	1.45	1.01	5.28	6.84	110.86
DB ISLAMIC DB	5.76	0.00	-1.20	-1.20	-1.20	0.70	0.93	6.53	7.81	41.71
EMAR.DU	8.50	0.00	4.04	4.04	4.04	7.32	0.97	6.33	5.88	75.13
Qatar										
QNB	14.200	0.71	0.71	-0.21	-0.21	-14.10	1.20	9.13	4.58	131.62
INDUSTREIS QAT	12.750	0.63	0.63	6.69	6.69	-2.52	1.93	16.34	6.12	77.19
QA ISLAMIC BK	18.750	1.24	1.24	2.18	2.18	-12.79	1.51	10.84	3.87	44.34
MASRAF AL RAYA	2.435	2.31	2.31	4.96	4.96	-8.29	0.92	16.11	4.11	22.71
MESAIEED PETRO	1.929	-0.98	-0.98	-2.77	-2.77	7.89	1.42	22.39	4.46	24.21
Oman										
BANK MUSCAT	0.27	2.27	2.27	3.05	3.05	2.27	0.86	10.70	5.74	2.03
OMANTEL	1.055	0.00	0.00	2.43	2.43	-0.47	1.24	29.18	5.69	0.79
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.65	17.13	4.84	0.48
NAT BANK OF OMAN	0.260	1.17	1.17	0.00	0.00	-7.14	0.63	9.33	3.27	0.42
OMINVEST	0.400	-4.76	-4.76	2.56	2.56	-4.76	0.88	10.95	5.00	0.27

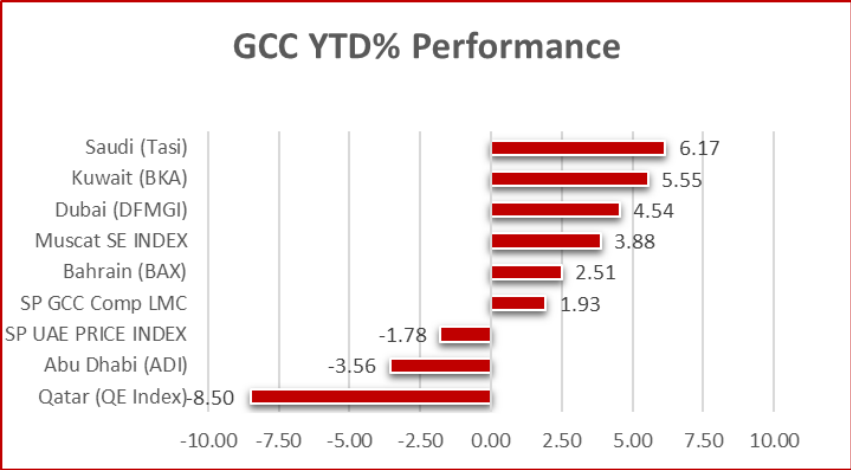
* Price performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
27-March-24	24.58%	14.94%	0.06%	2.52%	5.71%	17.99%	12.79%	6.29%	5.37%
3-April-24	24.59%	15.01%	0.06%	2.5%	5.76%	17.96%	12.82%	6.29%	5.38%

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



Leading Sector, Security Performance

Kuwait

The market is down today by -1.05 %The leading sector bottom performance indices today are Health care -2.01 % Industrials -1.61 % Banking -1.41 % respectively.

KSA

Eid Al Fiter Holiday for the Saudi Exchange Trading.



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