

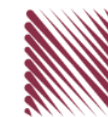


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 7, 2024

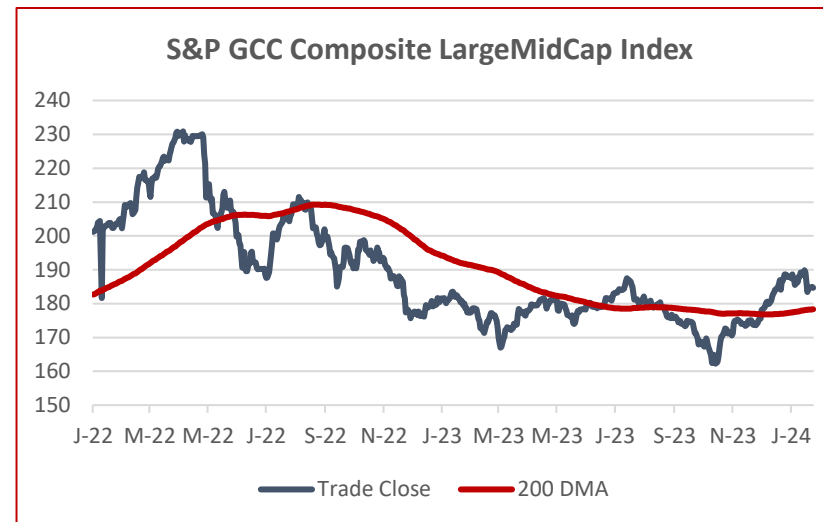




Wednesday, February 7, 2024

Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,796.6	0.30	2.42	3.44	1.97	1.97	2.39	20.48	2.82	10,822.94
Qatar (QE Index)	10,089.2	-0.29	-0.88	-1.27	-8.03	-8.03	1.18	11.70	5.02	513.39
Dubai (DFMGI)	4,169.1	0.60	-1.06	0.35	3.06	3.06	1.43	8.98	5.18	599.35
Abu Dhabi (ADI)	9,508.3	-0.20	-1.19	-1.73	-2.44	-2.44	2.85	18.59	2.06	2,639.51
Bahrain (BAX)	2,067.2	0.23	0.06	0.05	4.91	4.91	0.84	10.61	5.49	7.59
Muscat SE INDEX	4,561.9	-0.28	-0.36	-0.33	0.72	0.72	0.78	10.15	4.95	6.38
SP GCC Comp LMC	183.4	0.02	1.00	1.61	0.77	0.77	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.5	0.07	-1.76	-2.12	-2.34	-2.34				
Developed Markets										
MSCI World Index	3,205.3	0.47	1.04	2.37	3.54	3.54				
U.S. (S&P 500)	4,845.7	0.57	1.37	3.73	5.38	5.38	4.42	25.29	1.82	44,472.07
U.K. (FTSE 100)	7,630.6	-0.30	-0.56	-0.76	-2.08	-2.08	1.58	11.57	3.92	2,003.37
Japan (topix)	2,551.1	-0.19	0.72	0.27	8.09	8.09	1.52	14.47	2.12	918,978.51
Emerging Markets										
MSCI EM Index	975.8	-0.20	0.74	2.02	-2.76	-2.76				
China (SSE Composite)	2,788.5	1.28	4.97	2.77	-3.67	-3.67	1.36	12.00		44,025.04
India (Sensex)	71,752.1	0.23	-0.68	-0.22	-0.89	-0.89	4.59	22.70	1.15	143,080.11

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,256.16	-0.08	0.25	-0.17	6.44	6.44	1.51	15.34	3.09	46.98
Kuwait Premier Index	7,961.59	0.13	0.55	0.03	6.48	6.48	1.67	17.18	2.92	37.66
Kuwait Main Index	5,919.36	-0.86	-0.88	-0.90	6.28	6.28	1.08	10.37	3.79	9.33
Kuwait Sector										
Banking	1,762.00	0.02	0.65	0.32	6.95	6.95	1.75	17.60	2.62	29.78
Telecom	1,132.69	-3.11	-4.15	-4.86	2.49	2.49	1.71	10.22	6.24	3.48
Industrials	1,005.61	1.83	2.87	2.08	10.76	10.76	1.12	15.45	2.83	3.48
Financial Services	1,355.84	0.05	0.50	-0.18	11.85	11.85	1.09	13.31	3.42	4.31
Real Estate	1,234.90	1.93	0.97	0.93	1.81	1.81	0.94	14.58	1.98	2.65
Basic Materials	746.50	0.09	-1.42	-1.75	0.08	0.08	1.30	10.81	10.47	0.42
Health Care	479.42	0.00	-0.63	-0.63	-0.57	-0.57	1.74	12.03	1.74	0.24
Consumer Staples	704.18	0.44	-0.48	-0.15	6.92	6.92	1.61	15.06	1.75	0.21
Insurance	2,308.69	-0.75	-2.44	-2.23	0.69	0.69	1.30	7.88	4.04	0.93
Consumer Discretionary	1,538.19	-2.91	-2.39	-2.82	-4.10	-4.10				
Energy	1,030.14	-0.31	3.77	0.70	8.55	8.55	0.79	10.31	4.89	0.22
Technology	2,109.75	4.69	4.32	4.69	264.78	264.78	2.60			0.03
Utilities	431.58	-1.80	-1.80	-3.53	-5.20	-5.20				



What Move the GCC markets

Oil Prices

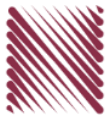
Oil prices ticked higher on Wednesday, as growth in U.S. oil production is expected to remain largely steady through 2025, easing worries of excess supply. Brent crude futures rose 38 cents, or 0.5%, to \$78.97 a barrel.

Kuwait Market

The market closed down by - 0.08 % at 7,268.16 value traded 75.5 million KD, Premier market value reached 43.7 million KD up by + 0.13 % at 7,961.59

KSA Market

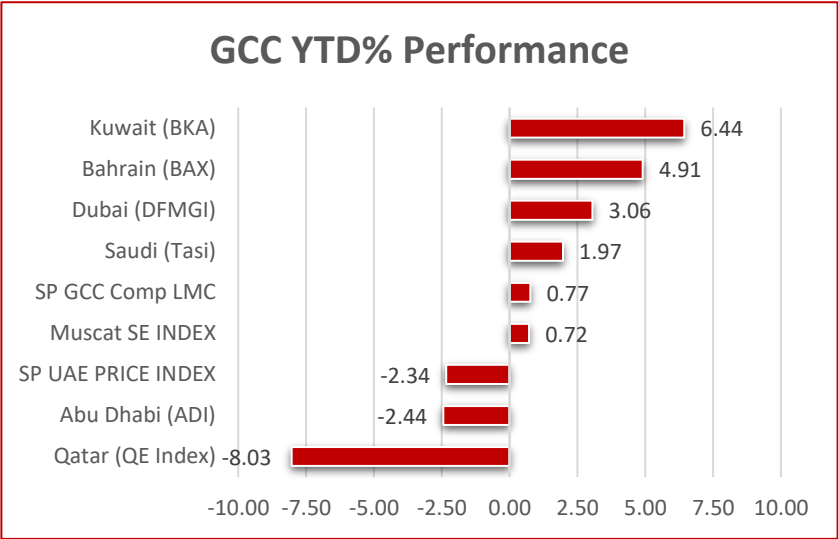
The market closed up by + 0.30 % at 11,796.6



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.972	-0.41	-0.10	-0.82	8.72	8.72	1.78	14.31	3.48	7.71
KFH	0.778	0.26	1.04	0.78	7.16	7.16	1.95	20.22	2.16	11.49
ZAIN	0.515	-0.77	-0.19	-2.09	1.58	1.58	1.79	10.30	6.80	2.23
BOUBYAN BANK	0.624	0.81	0.81	1.63	4.00	4.00	2.46	33.26	0.91	2.47
AGILITY	0.603	2.90	4.69	3.97	18.47	18.47	0.87	18.28	0.00	1.61
Saudi Arabia										
ARAMCO	30.70	-1.13	-0.97	0.33	-6.97	-6.97	4.81	15.63	4.94	7,429.40
SABIC	79.10	-0.38	0.89	1.54	-5.27	-5.27	1.36	77.16	4.30	237.30
STC	42.00	0.12	0.60	2.94	3.96	3.96	2.66	15.24	3.81	210.00
AL-RAJHI BANK	89.50	1.82	4.07	6.55	3.47	3.47	3.50	21.24	1.98	358.00
NCB	41.15	-0.12	0.00	1.35	6.47	6.47	1.45	12.84	3.15	246.90
Abu Dhabi										
ETISALAT.AD	18.80	-0.96	-1.90	-2.92	-5.19	-5.19	3.96	15.65	4.30	161.93
FAB.AD	13.64	0.00	-3.54	-6.83	-2.29	-2.29	1.20	9.56	5.21	150.69
EMIRATES NBD	17.30	0.29	-4.16	-2.26	0.00	0.00	1.00	5.21	6.94	109.28
DB ISLAMIC DB	6.39	0.00	0.16	1.11	11.71	11.71	1.04	7.25	7.04	46.27
EMAR.DU	7.70	3.36	2.80	3.63	-2.78	-2.78	0.91	7.11	3.25	68.06
Qatar										
QNB	15.000	-0.33	-3.16	-3.29	-9.26	-9.26	1.27	9.65	4.33	138.55
INDUSTREIS QAT	11.670	-1.44	-3.31	-2.75	-10.78	-10.78	1.83	15.13	9.43	70.60
QA ISLAMIC BK	20.240	2.02	4.87	3.79	-5.86	-5.86	1.63	11.70	3.58	47.83
MASRAF AL RAYA	2.351	-0.38	2.22	0.04	-11.45	-11.45	0.89	15.55	4.25	21.86
MESAIEED PETRO	1.690	-3.92	1.75	0.60	-5.48	-5.48	1.26	18.54	6.51	21.23
Oman										
BANK MUSCAT	0.27	-0.74	0.00	0.37	2.27	2.27	0.86	10.70	5.56	2.03
OMANTEL	1.081	-0.37	0.00	0.09	1.98	1.98	1.27	29.90	3.01	0.81
BANK DHOFAR	0.150	0.00	0.00	0.00	-6.25	-6.25	0.61	16.06	5.17	0.45
NAT BANK OF OMAN	0.243	0.41	-6.54	-8.65	-13.21	-13.21	0.59	8.77	3.50	0.40
OMINVEST	0.430	-2.27	-2.27	-4.44	2.38	2.38	0.95	11.77	3.49	0.29
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
31-January-24	24.37%	14.87%	0.06%	2.52%	0.19%	5.56%	17.79%	13.09%	6.24%	5.19%
7-February-24	24.38%	14.85%	0.06%	2.64%	0.19%	5.44%	17.89%	13.07%	6.25%	5.19%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.08 %The leading sector bottom performance indices today are Telecom -3.11 % Consumer Disc -2.91 % Utilities -1.8 % respectively

KSA
Saudi Armco has a negative performance today by - 1.13 %, SABIC has a negative performance today by - 0.38 %. STC have positive performance today by + 0.12 %, Al Rajhi Bank has a positive performance today by + 1.82 %

U.A.E
ETISALAT .AD has a negative performance today by -0.96 %, FAB.AD has a flat performance today



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