

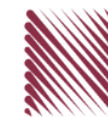


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 20, 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)	12,606.5	0.09	0.98	6.87	5.34	5.34	2.40	21.38	2.75	11,165.67
Qatar (QE Index)	10,308.5	0.08	1.52	2.17	-4.82	-4.82	1.22	12.22	4.52	529.20
Dubai (DFMGI)	4,277.4	0.10	0.44	2.60	5.36	5.36	1.46	8.46	5.15	616.52
Abu Dhabi (ADI)	9,400.3	-0.11	-0.28	-1.14	-1.85	-1.85	2.64	20.04	2.11	2,601.23
Bahrain (BAX)	2,048.5	-0.13	-0.92	-0.90	3.91	3.91	0.82	10.77	3.97	7.51
Muscat SE INDEX	4,581.5	-1.19	-1.05	0.43	1.49	1.49	0.79	10.26	4.80	6.41
SP GCC Comp LMC	191.3	0.28	0.79	4.31	3.44	3.44	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.2	-0.17	0.14	0.50	0.28	0.28				
Developed Markets										
MSCI World Index	3,274.3	-0.38	-0.33	2.15	3.32	3.32				
U.S. (S&P 500)	4,975.5	-0.60	-0.60	2.68	4.31	4.31	4.34	25.14	1.82	44,251.90
U.K. (FTSE 100)	7,719.2	-0.12	0.10	1.16	-0.18	-0.18	1.65	11.92	3.85	2,042.72
Japan (topix)	2,632.3	-0.28	0.29	3.18	11.24	11.24	1.55	14.71	2.07	944,797.63
Emerging Markets										
MSCI EM Index	1,019.0	0.26	0.27	4.43	-0.46	-0.46				
China (SSE Composite)	2,922.7	0.42	1.98	4.81	-1.75	-1.75	1.36	12.00		44,025.04
India (Sensex)	73,057.4	0.48	0.87	1.82	1.13	1.13	4.69	23.17	1.13	145,609.82

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,394.4	0.56	0.83	1.73	8.46	8.46	1.56		3.07	48.29
Kuwait Premier Index	8,106.8	0.57	0.84	1.85	8.42	8.42	1.74	17.38	2.94	40.12
Kuwait Main Index	6,054.1	0.49	0.77	1.36	8.70	8.70	1.05		3.73	8.18
Kuwait Sector										
Banking	1,795.3	0.67	0.98	2.22	8.97	8.97	1.85	17.67	2.63	30.82
Telecom	1,136.8	0.29	0.28	-4.51	2.86	2.86	1.68	10.73	6.38	3.48
Industrials	1,020.8	0.28	0.19	3.62	12.43	12.43	1.15	15.72	2.80	3.52
Financial Services	1,377.7	1.29	1.91	1.43	13.65	13.65	1.09	13.47	3.43	4.33
Real Estate	1,263.4	-0.91	-0.93	3.26	4.16	4.16	0.97		1.80	2.74
Basic Materials	775.2	0.27	1.47	2.03	3.93	3.93	1.35	11.20	10.11	0.44
Health Care	472.8	0.00	-1.39	-2.01	-1.95	-1.95	1.71	11.83	1.76	0.23
Consumer Staples	704.2	1.03	0.00	-0.14	6.93	6.93	1.60	16.49	1.77	0.21
Insurance	2,427.4	1.01	4.61	2.80	5.87	5.87	1.34	8.15	3.88	0.97
Consumer Discretionary	1,630.2	-0.26	-1.67	2.99	1.64	1.64				
Energy	1,079.6	2.97	0.16	5.54	13.76	13.76	0.80	10.55	4.80	0.22
Technology	2,058.8	0.00	-2.08	2.17	255.98	255.98	2.54			0.03
Utilities	439.5	-1.18	1.21	-1.77	-3.47	-3.47				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

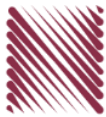
U.S. crude oil futures pulled back Tuesday after hitting a three-month high last week as the conflict in the Middle East raged on. The Brent contract for April dropped \$1.16, or 1.39%, to \$82.40 a barrel.

Kuwait Market

The market closed up by + 0.56 % at 7,394.4 value traded 71.4 million KD, Premier market value reached 55.5 million KD up by + 0.57 % at 8,106.8.

KSA Market

The market closed up by + 0.09 % at 12,606.5

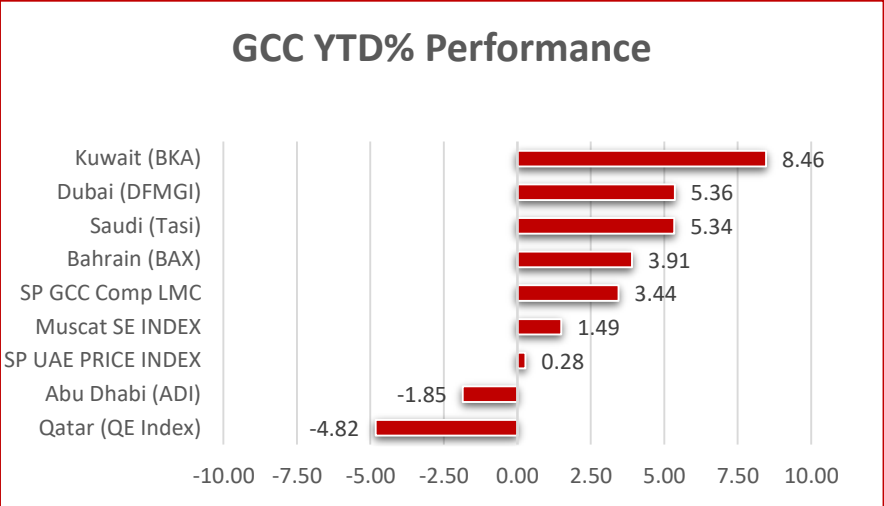


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.980	0.10	0.31	0.00	9.62	9.62	1.80	14.43	3.57	7.77
KFH	0.798	1.27	1.53	3.37	9.92	9.92	2.00	20.74	2.11	12.52
ZAIN	0.517	0.58	0.58	-1.71	1.97	1.97	1.79	10.34	6.77	2.24
BOUBYAN BANK	0.633	0.48	2.10	3.09	5.50	5.50	2.50	33.74	0.89	2.51
AGILITY	0.610	0.83	0.49	5.17	19.84	19.84	0.88	18.50	0.00	1.63
Saudi Arabia										
ARAMCO	31.65	-0.94	-0.94	3.43	-4.09	-4.09	4.96	16.11	4.79	7,659.30
SABIC	79.40	0.25	0.51	1.93	-4.91	-4.91	1.37	77.45	4.28	238.20
STC	42.80	2.51	2.76	4.90	5.94	5.94	2.71	15.53	3.74	214.00
AL-RAJHI BANK	90.70	0.78	1.11	7.98	4.86	4.86	3.40	22.96	1.96	362.80
NCB	42.20	1.81	0.60	3.94	9.18	9.18	1.43	13.06	3.08	253.20
Abu Dhabi										
ETISALAT.AD	19.06	0.00	0.32	-0.63	-2.95	-2.95	4.05	16.02	4.20	165.76
FAB.AD	14.36	-0.55	-1.51	-1.91	2.87	2.87	1.27	10.06	4.94	158.65
EMIRATES NBD	18.60	0.54	2.20	5.08	7.51	7.51	1.07	5.60	6.45	117.49
DB ISLAMIC DB	6.50	0.46	-0.46	2.85	13.64	13.64	1.05	7.37	6.92	47.07
EMAR.DU	8.20	0.00	0.24	10.36	3.54	3.54	0.97	7.57	3.05	72.48
Qatar										
QNB	15.080	0.07	1.62	-2.77	-8.77	-8.77	1.28	9.70	4.31	139.29
INDUSTREIS QAT	12.200	0.83	1.50	1.67	-6.73	-6.73	1.85	15.64	6.39	73.81
QA ISLAMIC BK	20.650	-0.48	0.93	5.90	-3.95	-3.95	1.66	11.94	3.51	48.80
MASRAF AL RAYA	2.482	-0.28	3.12	5.62	-6.52	-6.52	0.94	16.42	4.03	23.08
MESAIEED PETRO	1.780	-0.56	2.89	5.95	-0.45	-0.45	1.31	20.66	4.83	22.36
Oman										
BANK MUSCAT	0.267	-1.11	-1.11	-0.74	1.14	1.14	0.85	10.58	5.62	2.00
OMANTEL	1.080	0.00	0.00	0.00	1.89	1.89	1.27	29.88	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	0.250	-5.66	-7.41	-6.02	-10.71	-10.71	0.60	8.97	3.40	0.41
OMINVEST	0.430	-2.05	-2.05	-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
7-February-24	24.38%	14.85%	0.06%	2.64%	0.19%	5.44%	17.89%	13.07%	6.25%	5.19%
14-February-24	24.44%	14.80%	0.06%	2.69%	0.19%	5.46%	17.90%	13.20%	6.26%	5.21%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.56 %The leading sector best performance indices today are Energy 2.97 % Financial services 1.29 % Consumer services 1.03 % respectively.

KSA
Saudi Armco has a positive performance today by -.94%, SABIC have positive performance today by +.25%. STC has a positive performance today by + 0.78 %, Al Rajhi Bank has a positive performance today by + 1.81 %

U.A.E
ETISALAT .AD have negative performance today by 0.0%, FAB.AD has performance today by - 0.55%.



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