



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, 1<sup>st</sup> May 2024





Wednesday, May 1, 2024

| * Market Watch           | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |        |        |      |       |                |                       |
| Saudi (Tasi)             | 12,345.7    | -0.40 | 0.74  | -0.40 | -0.45  | 3.16   | 2.36 | 20.98 | 3.12           | 10,753.27             |
| Qatar (QE Index)         | 9,708.9     | -0.19 | 0.74  | -0.19 | -1.40  | -10.36 | 1.12 | 11.06 | 4.89           | 489.09                |
| Dubai (DFMGI)            | 4,133.3     | -0.54 | -0.36 | -0.54 | -2.66  | 1.81   | 1.35 | 7.99  | 5.88           | 594.02                |
| Abu Dhabi (ADI)          | 9,032.1     | -0.39 | -0.11 | -0.39 | -2.12  | -5.70  | 2.56 | 16.67 | 2.11           | 2,527.08              |
| Bahrain (BAX)            | 2,029.1     | 0.13  | 0.60  | -0.67 | -0.67  | 2.92   | 0.87 | 10.68 | 4.25           | 8.26                  |
| Muscat SE INDEX          | 4,767.2     | -0.36 | 1.14  | -0.36 | 2.84   | 5.61   | 0.81 | 10.38 | 5.47           | 6.64                  |
| SP GCC Comp LMC          | 180.5       | -0.69 | 0.52  | -0.69 | -2.67  | -2.43  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 129.4       | -1.27 | -0.55 | -1.27 | -3.88  | -6.10  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |        |        |      |       |                |                       |
| MSCI World Index         | 3,294.0     | -0.34 | -1.23 | -0.34 | -4.18  | 3.94   |      |       |                |                       |
| U.S. (S&P 500)           | 5,018.4     | -0.34 | -1.60 | -0.34 | -4.49  | 5.21   | 4.17 | 24.84 | 1.75           | 44,551.90             |
| U.K. (FTSE 100)          | 8,121.2     | -0.28 | -0.23 | -0.28 | 2.12   | 5.02   | 1.73 | 13.40 | 3.68           | 2,147.08              |
| Japan (topix)            | 2,729.4     | -0.50 | 1.60  | -0.50 | -1.42  | 15.34  | 1.55 | 15.42 | 2.03           | 968,249.34            |
| <b>Emerging Markets</b>  |             |       |       |       |        |        |      |       |                |                       |
| MSCI EM Index            | 1,045.5     | -0.04 | 0.38  | -0.04 | 0.22   | 2.13   |      |       |                |                       |
| China (SSE Composite)    | 3,104.8     | -0.26 | 0.52  | 2.09  | 2.09   | 4.37   | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 74,482.8    | -0.25 | 1.02  | 1.13  | 1.13   | 3.10   | 4.83 | 22.65 | 1.13           | 147,208.95            |
|                          |             |       |       |       |        |        |      |       |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |        |        |      |       |                |                       |
| Kuwait All Share Index   | 7,025.4     | -0.36 | -0.01 | -0.36 | -4.12  | 3.05   | 1.44 | 15.24 | 3.57           | 42.48                 |
| Kuwait Premier Index     | 7,660.0     | -0.41 | -0.04 | -0.41 | -4.69  | 2.45   | 1.56 | 16.50 | 3.40           | 35.02                 |
| Kuwait Main Index        | 5,911.7     | -0.14 | 0.15  | -0.14 | -1.24  | 6.14   | 1.03 | 10.77 | 4.45           | 7.46                  |
| <b>Kuwait Sector</b>     |             |       |       |       |        |        |      |       |                |                       |
| Banking                  | 1,724.4     | -0.37 | -0.20 | -0.37 | -2.67  | 4.67   | 1.72 | 17.29 | 3.06           | 25.92                 |
| Telecom                  | 1,040.5     | -0.31 | 0.35  | -0.31 | -2.31  | -5.85  | 1.53 | 11.35 | 8.05           | 3.19                  |
| Industrials              | 768.9       | 0.07  | 1.88  | 0.07  | -26.45 | -15.31 | 0.81 | 11.82 | 4.57           | 2.61                  |
| Financial Services       | 1,327.2     | -0.46 | -0.57 | -0.46 | -1.95  | 9.48   | 1.06 | 13.17 | 3.25           | 4.47                  |
| Real Estate              | 1,277.2     | -0.67 | -0.27 | -0.67 | -1.42  | 5.30   | 0.98 | 13.87 | 2.07           | 2.73                  |
| Basic Materials          | 851.4       | -0.37 | 1.15  | -0.37 | 7.78   | 14.14  | 1.47 | 11.92 | 9.15           | 0.48                  |
| Health Care              | 487.3       | 0.00  | 8.26  | 0.00  | 41.82  | 1.07   | 1.74 | 12.23 | 1.77           |                       |
| Consumer Staples         | 834.6       | 0.21  | -0.65 | 0.21  | 8.02   | 26.73  | 1.81 | 21.73 |                | 0.25                  |
| Insurance                | 2,497.4     | 0.42  | -2.33 | 0.42  | -2.73  | 8.92   | 1.36 | 13.13 | 3.19           | 1.00                  |
| Consumer Discretionary   | 1,670.4     | -0.58 | 1.15  | -0.58 | -4.64  | 4.15   |      |       |                |                       |
| Energy                   | 1,057.7     | -0.39 | 1.97  | -0.39 | 1.41   | 11.45  | 0.87 | 10.22 | 4.74           | 0.22                  |
| Technology               | 1,906.1     | 0.00  | 0.00  | 0.00  | 0.00   | 229.56 | 2.35 |       |                | 0.03                  |
| Utilities                | 421.1       | -3.61 | 3.23  | -3.61 | -5.33  | -7.51  |      |       |                |                       |

\* International and GCC Markets performance at the latest close.

### S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices rose on Thursday on the prospect the U.S. may start buying crude for its petroleum reserve, after prices sank to a seven-week low on hopes for an Israel-Gaza ceasefire, doubts about U.S. interest rate cuts and swelling oil inventories. Snapping three days of losses, Brent crude futures for July gained 21 cents, or 0.3%, to \$83.65 a barrel.

#### Kuwait Market

The market closed down by – 0.36% at 7,025.4 value traded 37.9 million KD, Premier market value reached 25.7 million KD down by – 0.41 % at 7,660.0.

#### KSA Market

The market closed down by – 0.40% at 12,345.7.



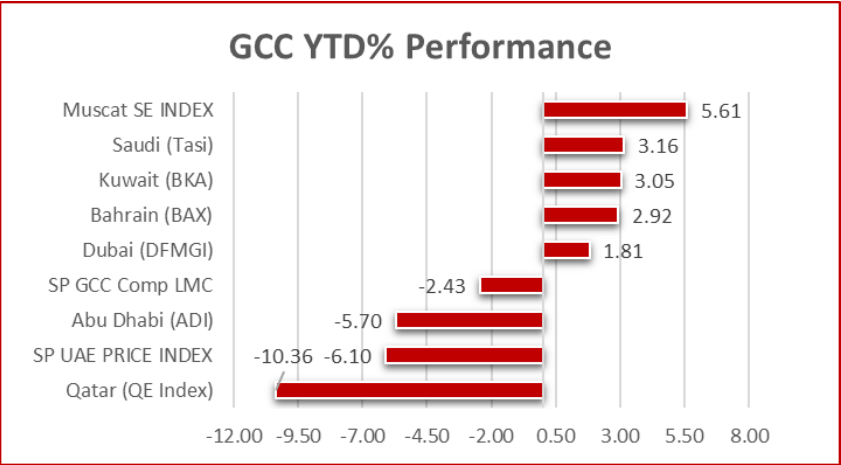
| * Description    | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|------------------|-------------|-------|-------|-------|--------|--------|------|--------|----------------|-----------------------|
| Blue Chip Watch  |             |       |       |       |        |        |      |        |                |                       |
| Kuwait           |             |       |       |       |        |        |      |        |                |                       |
| NBK              | 0.864       | -0.12 | 0.12  | -0.12 | -4.51  | 1.48   | 1.70 | 13.53  | 3.86           | 7.20                  |
| KFH              | 0.717       | -0.42 | -0.83 | -0.42 | -1.82  | 7.65   | 2.10 | 21.10  | 2.56           | 12.28                 |
| ZAIN             | 0.487       | -0.20 | 0.41  | -0.20 | -1.22  | -3.94  | 1.69 | 9.78   | 7.19           | 2.11                  |
| BOUBYAN BANK     | 0.586       | -0.51 | 0.51  | -0.51 | 0.51   | 3.53   | 2.47 | 31.27  | 1.29           | 2.46                  |
| AGILITY          | 0.320       | 1.27  | 5.61  | 1.27  | -12.06 | 12.99  | 0.46 | 9.77   | 3.13           | 0.86                  |
| Saudi Arabia     |             |       |       |       |        |        |      |        |                |                       |
| ARAMCO           | 30.05       | -0.17 | -0.17 | -0.17 | -2.59  | -8.94  | 4.74 | 16.06  | 5.64           | 7,271.91              |
| SABIC            | 83.80       | -0.83 | 6.35  | -0.83 | 7.02   | 0.36   | 1.50 | 192.69 | 4.06           | 251.39                |
| STC              | 37.30       | -0.93 | -0.13 | -0.93 | -3.29  | -5.20  | 2.35 | 14.03  | 4.29           | 186.50                |
| AL-RAJHI BANK    | 79.90       | 0.00  | 3.10  | 0.00  | -2.92  | -7.63  | 2.99 | 20.23  | 2.88           | 319.59                |
| NCB              | 37.25       | -0.93 | 0.81  | -0.93 | -7.34  | -3.62  | 1.26 | 11.52  | 4.70           | 223.49                |
| Abu Dhabi        |             |       |       |       |        |        |      |        |                |                       |
| ETISALAT.AD      | 16.62       | -2.24 | -2.12 | -2.24 | -9.48  | -15.38 | 3.32 | 13.84  | 4.81           | 144.55                |
| FAB.AD           | 12.22       | -2.08 | -1.93 | -2.08 | -7.56  | -12.46 | 1.08 | 8.57   | 5.81           | 135.01                |
| EMIRATES NBD     | 16.90       | -0.59 | 0.90  | -0.59 | -3.43  | -2.31  | 0.99 | 4.92   | 7.10           | 106.76                |
| DB ISLAMIC DB    | 5.56        | 0.00  | 1.09  | 0.00  | -4.63  | -2.80  | 0.94 | 6.19   | 8.09           | 40.26                 |
| EMAR.DU          | 7.71        | -6.09 | -5.28 | -6.09 | -5.63  | -2.65  | 0.88 | 5.74   | 6.49           | 68.15                 |
| Qatar            |             |       |       |       |        |        |      |        |                |                       |
| QNB              | 13.900      | 0.22  | 0.36  | 0.22  | -2.32  | -15.91 | 1.23 | 8.78   | 4.68           | 128.39                |
| INDUSTREIS QAT   | 12.300      | 0.41  | 2.50  | 0.41  | 2.93   | -5.96  | 2.04 | 15.39  | 6.34           | 74.42                 |
| QA ISLAMIC BK    | 18.100      | -1.09 | 1.46  | -1.09 | -1.36  | -15.81 | 1.49 | 10.34  | 4.01           | 42.77                 |
| MASRAF AL RAYA   | 2.497       | -0.60 | 0.89  | -0.60 | 7.63   | -5.95  | 0.97 | 16.28  | 4.00           | 23.22                 |
| MESAIEED PETRO   | 1.854       | -3.39 | -1.90 | -3.39 | -6.55  | 3.69   | 1.36 | 21.52  | 4.64           | 23.29                 |
| Oman             |             |       |       |       |        |        |      |        |                |                       |
| BANK MUSCAT      | 0.264       | 0.76  | 0.00  | 0.76  | 0.76   | 0.00   | 0.86 | 10.30  | 5.87           | 1.98                  |
| OMANTEL          | 1.050       | 0.48  | 0.00  | 0.48  | 1.94   | -0.94  | 1.22 | 24.07  | 5.71           | 0.79                  |
| BANK DHOFAR      | 0.160       | 0.00  | 1.27  | 0.00  | 0.00   | 0.00   | 0.67 | 15.87  | 4.84           | 0.48                  |
| NAT BANK OF OMAN | 0.257       | 0.00  | 1.98  | 0.00  | -1.15  | -8.21  | 0.62 | 9.00   | 3.31           | 0.42                  |
| OMINVEST         | 0.371       | -3.39 | -2.19 | -3.39 | 1.07   | -6.15  | 0.81 | 7.57   | 5.39           | 0.25                  |

\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 17-April-24     | 24.56% | 14.94% | 0.06% | 2.47% | 5.84% | 17.96% | 12.87% | 6.29% | 5.38% |
| 24-April-24     | 24.52% | 14.97% | 0.06% | 2.37% | 5.49% | 17.92% | 12.95% | 6.27% | 5.42% |

End of Report

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\* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.36 %The leading sector bottom performance indices today are Utilities -3.61 % Real estate -0.67 % Consumer Disc -0.58 % respectively.

KSA

Saudi Armco have negative performance today by -0.17 %, SABIC have negative performance today by -0.82%. STC have negative performance today by -0.93 %, Al Rajhi Bank flat performance today 0 %.



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