

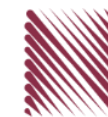


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 2nd May 2024



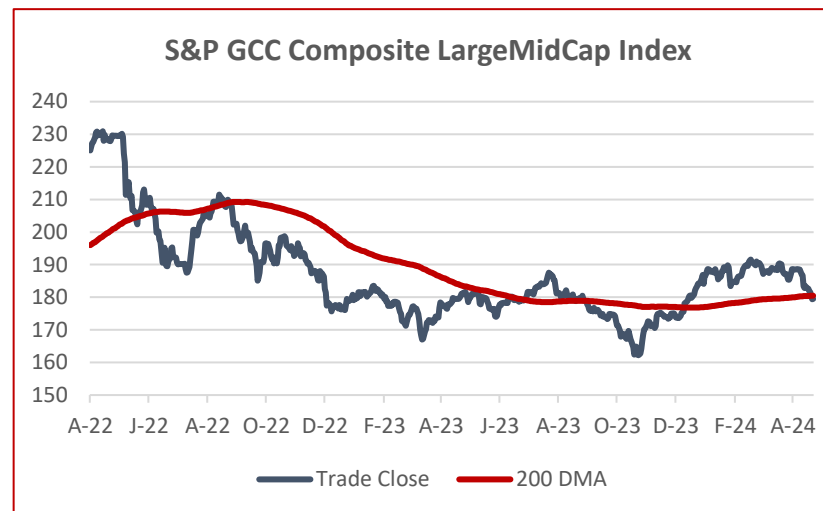


Thursday, May 2, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,352.3	0.05	0.80	-0.34	-0.40	3.22	2.36	21.01	3.12	10,732.10
Qatar (QE Index)	9,610.8	-1.01	-0.28	-1.19	-2.40	-11.26	1.11	10.95	4.93	484.80
Dubai (DFMGI)	4,142.7	0.05	-0.13	-0.31	-2.44	2.04	1.36	8.02	5.86	595.80
Abu Dhabi (ADI)	9,037.4	0.15	-0.05	-0.33	-2.07	-5.64	2.57	16.47	2.12	2,524.14
Bahrain (BAX)	2,028.6	-0.02	0.58	-0.02	-0.69	2.90	0.87	10.67	4.25	8.26
Muscat SE INDEX	4,773.3	0.13	1.27	-0.23	2.97	5.74	0.81	10.38	5.48	6.64
SP GCC Comp LMC	180.3	0.04	0.42	-0.80	-2.77	-2.53	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.5	0.14	-0.46	-1.17	-3.79	-6.01				
Developed Markets										
MSCI World Index	3,361.4	1.19	0.79	1.70	-2.22	6.07				
U.S. (S&P 500)	5,127.8	1.26	0.55	1.83	-2.41	7.50	4.25	25.24	1.72	45,338.20
U.K. (FTSE 100)	8,213.5	0.51	0.90	0.85	3.28	6.21	1.75	13.57	3.71	2,171.44
Japan (topix)	2,728.5	-0.03	1.57	-0.53	-1.45	15.30	1.55	15.43	2.03	967,557.45
Emerging Markets										
MSCI EM Index	1,061.4	0.82	1.91	1.48	1.75	3.68				
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)	73,878.2	-0.98	0.20	-0.81	0.31	2.27	4.79	22.46	1.14	146,059.09

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,033.5	0.11	0.11	-0.25	-4.01	3.17	1.44	15.22	3.59	42.37
Kuwait Premier Index	7,651.0	-0.12	-0.16	-0.53	-4.80	2.33	1.56	16.44	3.41	34.84
Kuwait Main Index	5,985.5	1.25	1.40	1.11	0.00	7.47	1.05	10.88	4.44	7.53
Kuwait Sector										
Banking	1,722.3	-0.12	-0.32	-0.49	-2.78	4.54	1.71	17.26	3.08	25.79
Telecom	1,053.1	1.21	1.56	0.89	-1.13	-4.71	1.54	11.46	7.98	3.22
Industrials	765.9	-0.38	1.49	-0.31	-26.73	-15.64	0.81	11.79	4.63	2.60
Financial Services	1,339.8	0.95	0.38	0.48	-1.02	10.52	1.07	13.23	3.23	4.49
Real Estate	1,284.7	0.59	0.31	-0.08	-0.84	5.92	0.98	13.77	2.07	2.73
Basic Materials	837.2	-1.66	-0.53	-2.03	5.99	12.24	1.44	11.68	9.34	0.47
Health Care	487.3	0.00	8.26	0.00	41.82	1.07	1.74	12.23	1.77	
Consumer Staples	830.6	-0.49	-1.14	-0.28	7.49	26.11	1.80	21.67	2.47	0.25
Insurance	2,495.5	-0.08	-2.40	0.34	-2.80	8.84	1.36	13.18	3.18	1.01
Consumer Discretionary	1,676.4	0.36	1.51	-0.23	-4.29	4.52				
Energy	1,058.6	0.08	2.05	-0.31	1.49	11.54	0.87	10.21	5.50	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	421.1	0.00	3.23	-3.61	-5.33	-7.51				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged lower on Friday, and were on course for their steepest weekly loss in three months, as investors weighed weaker-than-expected U.S. jobs data and the timing of a Federal Reserve interest rate cut. Brent crude futures for July were down 71 cents, or 0.85%, to settle at \$82.96 a barrel.

Kuwait Market

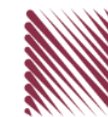
The market closed up by + 0.11% at 7,033.5 value traded 44.9 million KD, Premier market value reached 31.2 million KD down by - 0.12 % at 7,651.0.

KSA Market

The market closed up by 0.05% at 12,352.3.

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	0.858	-0.69	-0.58	-0.81	-5.17	0.77	1.69	13.44	3.89	7.14
KFH	0.717	0.00	-0.83	-0.42	-1.82	7.65	2.10	21.10	2.56	12.27
ZAIN	0.488	0.21	0.62	0.00	-1.01	-3.75	1.69	9.80	7.17	2.11
BOUBAYAN BANK	0.588	0.34	0.86	-0.17	0.85	3.88	2.47	31.38	1.28	2.47
AGILITY	0.316	-1.25	4.29	0.00	-13.16	11.57	0.46	9.65	3.16	0.85
Saudi Arabia										
ARAMCO	29.95	-0.33	-0.50	-0.50	-2.92	-9.24	4.72	16.00	5.66	7,247.90
SABIC	82.50	-1.55	4.70	-2.37	5.36	-1.20	1.48	189.70	4.12	247.50
STC	37.30	0.00	-0.13	-0.93	-3.29	-5.20	2.35	14.03	4.29	186.50
AL-RAJHI BANK	79.80	-0.13	2.97	-0.13	-3.04	-7.75	2.99	20.20	2.88	319.20
NCB	36.20	-2.82	-2.03	-3.72	-9.95	-6.34	1.22	11.20	4.83	217.20
Abu Dhabi										
ETISALAT.AD	16.34	-0.98	-4.71	-4.82	-11.87	-17.62	3.23	13.47	4.94	140.71
FAB.AD	12.10	0.66	-2.25	-2.40	-7.87	-12.75	1.13	8.46	5.83	134.56
EMIRATES NBD	16.70	-0.60	-0.30	-1.76	-4.57	-3.47	0.97	4.87	7.19	105.49
DB ISLAMIC DB	5.64	0.36	2.55	1.44	-3.26	-1.40	0.95	6.28	7.98	40.84
EMAR.DU	7.80	-1.27	-4.18	-4.99	-4.53	-1.52	0.89	5.81	6.41	68.94
Qatar										
QNB	13.890	-0.07	0.29	0.14	-2.39	-15.97	1.23	8.77	4.68	128.29
INDUSTREIS QAT	12.250	-0.41	2.08	0.00	2.51	-6.35	2.03	15.33	6.37	74.11
QA ISLAMIC BK	17.820	-1.55	-0.11	-2.62	-2.89	-17.12	1.47	10.18	4.07	42.11
MASRAF AL RAYA	2.430	-2.68	-1.82	-3.26	4.74	-8.47	0.94	15.84	4.12	22.60
MESAIEED PETRO	1.813	-2.21	-4.07	-5.52	-8.62	1.40	1.41	22.60	4.74	22.78
Oman										
BANK MUSCAT	0.263	-0.38	-0.38	0.38	0.38	-0.38	0.86	10.26	5.89	1.97
OMANTEL	1.054	0.38	0.38	0.86	2.33	-0.57	1.22	24.16	5.69	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	0.260	1.17	3.17	1.17	0.00	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.375	1.08	-1.13	-2.34	2.16	-5.13	0.82	7.65	5.33	0.25

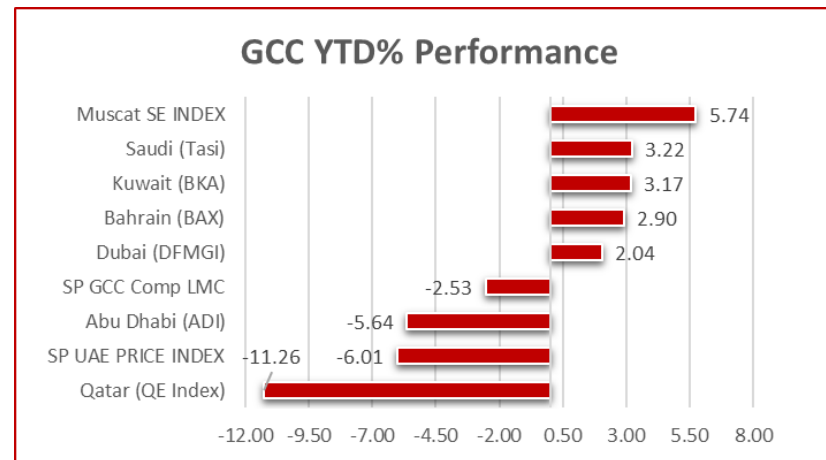
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
24-April-24	24.52%	14.97%	0.06%	2.37%	5.49%	17.92%	12.95%	6.27%	5.42%
01-May-24	24.51%	14.95%	0.06%	2.34%	5.57%	17.89%	12.94%	6.25%	5.44%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.11 % The leading sector best performance indices today are Telecom 1.21 % Financial services 0.95 % Real estate 0.59 % respectively.

KSA

Saudi Armco have negative performance today by -0.33 %, SABIC have negative performance today by -1.5%. STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.13 %.



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