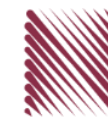


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 3rd May 2024



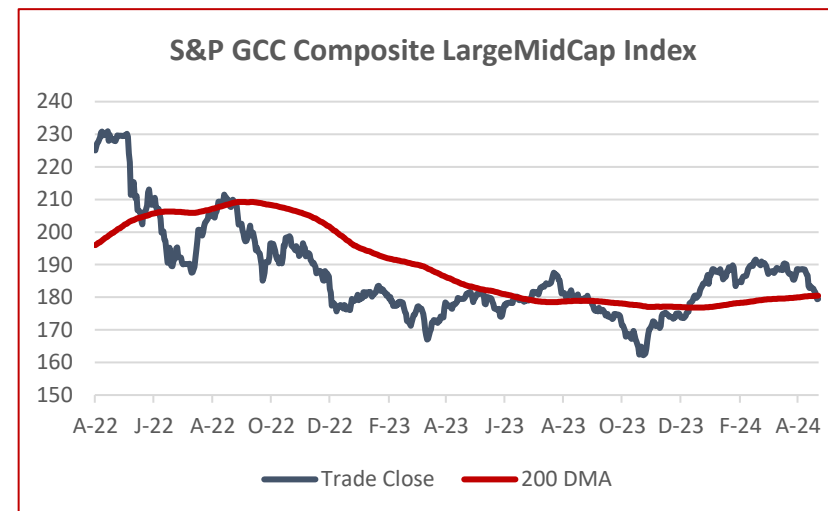


Sunday, May 5, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,373.1	0.17	0.17	-0.18	-0.23	3.39	2.36	21.06	3.11	10,746.33
Qatar (QE Index)	9,690.1	0.82	0.82	-0.38	-1.59	-10.53	1.12	11.05	4.89	488.84
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)	2,031.2	0.13	0.13	0.10	-0.56	3.03	0.88	10.69	4.25	8.27
Muscat SE INDEX	4,805.2	0.67	0.67	0.44	3.66	6.45	0.81	10.35	5.44	6.66
SP GCC Comp LMC	180.8	0.32	0.32	-0.48	-2.46	-2.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.5	0.00	0.00	-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	7,043.7	0.15	0.15	-0.10	-3.87	3.32	1.44	15.22	3.59	42.37
Kuwait Premier Index	7,667.0	0.21	0.21	-0.32	-4.60	2.54	1.56	16.44	3.41	34.84
Kuwait Main Index	5,975.8	-0.16	-0.16	0.95	-0.16	7.29	1.05	10.88	4.44	7.53
Kuwait Sector										
Banking	1,728.2	0.34	0.34	-0.15	-2.45	4.90	1.71	17.26	3.08	25.79
Telecom	1,049.3	-0.36	-0.36	0.53	-1.48	-5.05	1.54	11.46	7.98	3.22
Industrials	756.7	-1.21	-1.21	-1.51	-27.61	-16.66	0.81	11.79	4.63	2.60
Financial Services	1,343.5	0.28	0.28	0.76	-0.74	10.83	1.07	13.23	3.23	4.49
Real Estate	1,290.1	0.42	0.42	0.34	-0.42	6.37	0.98	13.77	2.07	2.73
Basic Materials	837.1	-0.02	-0.02	-2.05	5.97	12.22	1.44	11.68	9.34	0.47
Health Care	473.4	-2.86	-2.86	-2.86	37.77	-1.83	1.74	12.23	1.77	
Consumer Staples	836.0	0.66	0.66	0.37	8.20	26.94	1.80	21.67	2.47	0.25
Insurance	2,497.2	0.07	0.07	0.41	-2.73	8.92	1.36	13.18	3.18	1.01
Consumer Discretionary	1,674.7	-0.11	-0.11	-0.33	-4.40	4.41				
Energy	1,061.3	0.25	0.25	-0.05	1.75	11.83	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	415.8	-1.25	-1.25	-4.82	-6.51	-8.67				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

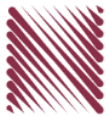
Oil futures edged up on Monday after Saudi Arabia hiked June crude prices for most regions and as the prospect of a Gaza ceasefire deal appeared slim, renewing fears the Israel-Hamas conflict could still widen in the key oil producing region. Brent crude futures climbed 28 cents, or 0.3%, to \$83.24 a barrel.

Kuwait Market

The market closed up by + 0.15% at 7,043.7 value traded 36.8 million KD, Premier market value reached 23.8 million KD up by + 0.21% at 7,667.0.

KSA Market

The market closed up by + 0.17% at 12,373.1.



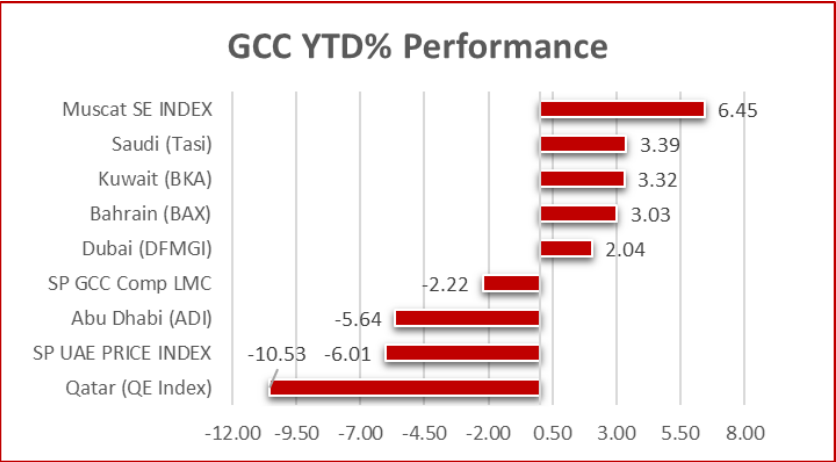
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.860	0.23	0.23	-0.58	-4.95	1.01	1.69	13.47	3.88	7.16
KFH	0.720	0.42	0.42	0.00	-1.41	8.10	2.11	21.19	2.55	12.32
ZAIN	0.487	-0.20	-0.20	-0.20	-1.22	-3.94	1.69	9.78	7.19	2.11
BOUBYAN BANK	0.588	0.00	0.00	-0.17	0.85	3.88	2.47	31.38	1.28	2.47
AGILITY	0.306	-3.16	-3.16	-3.16	-15.91	8.04	0.44	9.35	6.54	0.82
Saudi Arabia										
ARAMCO	30.00	0.17	0.17	-0.33	-2.76	-9.09	4.73	16.03	5.65	7,260.00
SABIC	81.90	-0.73	-0.73	-3.08	4.60	-1.92	1.47	188.32	4.15	245.70
STC	37.30	0.00	0.00	-0.93	-3.29	-5.20	2.35	14.03	4.29	186.50
AL-RAJHI BANK	81.00	1.50	1.50	1.38	-1.58	-6.36	3.03	20.51	2.84	324.00
NCB	36.75	1.52	1.52	-2.26	-8.58	-4.92	1.24	11.37	4.76	220.50
Abu Dhabi										
ETISALAT.AD	16.18	-0.98	-4.71	-4.82	-11.87	-17.62	3.23	13.47	4.94	140.71
FAB.AD	12.18	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	14.050	1.15	1.15	1.30	-1.26	-15.00	1.24	8.87	4.63	129.77
INDUSTREIS QAT	12.330	0.65	0.65	0.65	3.18	-5.73	2.04	15.43	6.33	74.60
QA ISLAMIC BK	17.900	0.45	0.45	-2.19	-2.45	-16.74	1.48	10.23	4.05	42.30
MASRAF AL RAYA	2.436	0.25	0.25	-3.03	5.00	-8.25	0.94	15.88	4.11	22.65
MESAIEED PETRO	1.810	-0.17	-0.17	-5.68	-8.77	1.23	1.40	22.56	4.75	22.74
Oman										
BANK MUSCAT	0.262	-0.38	-0.38	0.00	0.00	-0.76	0.86	10.22	5.92	1.97
OMANTEL	1.055	0.09	0.09	0.96	2.43	-0.47	1.22	24.18	5.69	0.79
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.270	3.85	3.85	5.06	3.85	-3.57	0.65	9.45	3.15	0.44
OMINVEST	0.375	0.00	0.00	-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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* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.15 %The leading sector best performance indices today are Consumer services 0.66 % Real estate 0.42 % Banking 0.34 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.17 %, SABIC have negative performance today by -0.7%. STC flat performance today 0 %, Al Rajhi Bank has a positive performance today by + 1.5 %.



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