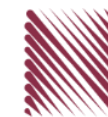


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 4th May 2024





Monday, May 6, 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)	12,372.5	0.00	0.16	-0.18	-0.23	3.39	2.36	21.00	3.13	10,731.75
Qatar (QE Index)	9,638.9	-0.53	0.29	-0.91	-2.11	-11.00	1.12	10.99	4.92	486.41
Dubai (DFMGI)	4,155.9	0.32	0.32	0.00	-2.13	2.37	1.36	8.06	5.83	598.88
Abu Dhabi (ADI)	9,035.2	-0.02	-0.02	-0.36	-2.09	-5.67	2.57	16.47	2.12	2,524.34
Bahrain (BAX)	2,022.3	-0.44	-0.31	-0.33	-1.00	2.58	0.87	10.65	4.26	8.21
Muscat SE INDEX	4,791.7	-0.28	0.38	0.16	3.36	6.15	0.81	10.32	5.46	6.66
SP GCC Comp LMC	180.5	-0.19	0.12	-0.67	-2.65	-2.41	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.0	0.35	0.35	-0.83	-3.45	-5.69				
Developed Markets										
MSCI World Index	3,391.1	0.88	0.88	2.60	-1.36	7.00				
U.S. (S&P 500)	5,180.7	1.03	1.03	2.88	-1.40	8.61	4.25	25.20	1.72	45,331.44
U.K. (FTSE 100)	8,213.5	0.00	0.00	0.85	3.28	6.21	1.76	13.57	3.71	2,171.42
Japan (topix)	2,728.5	-0.03	1.57	-0.53	-1.45	15.30	1.55	15.43	2.03	967,524.47
Emerging Markets										
MSCI EM Index	1,066.7	0.50	0.50	1.99	2.26	4.20				
China (SSE Composite)	3,140.7	1.16	1.16	1.16	3.27	5.57	1.36	12.00		44,025.04
India (Sensex)	73,895.5	0.02	0.02	-0.79	0.33	2.29	4.79	22.43	1.14	146,043.39
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,040.4	-0.05	0.10	-0.15	-3.91	3.27	1.44	15.20	3.62	42.43
Kuwait Premier Index	7,655.2	-0.15	0.05	-0.47	-4.75	2.38	1.56	16.43	3.45	34.91
Kuwait Main Index	6,004.4	0.48	0.31	1.43	0.31	7.80	1.04	10.84	4.42	7.52
Kuwait Sector										
Banking	1,724.1	-0.24	0.11	-0.39	-2.68	4.65	1.72	17.25	3.07	25.88
Telecom	1,053.0	0.35	-0.01	0.89	-1.14	-4.72	1.54	11.42	8.01	3.21
Industrials	762.4	0.76	-0.46	-0.76	-27.06	-16.02	0.80	11.54		2.56
Financial Services	1,343.8	0.02	0.30	0.78	-0.72	10.85	1.07	13.27	2.97	4.50
Real Estate	1,284.4	-0.45	-0.03	-0.11	-0.87	5.89	0.99	13.86	2.04	2.74
Basic Materials	843.1	0.72	0.70	-1.34	6.73	13.03	1.44	11.68	9.34	0.47
Health Care	475.0	0.36	-2.51	-2.51	38.26	-1.47	1.69	11.88	1.82	
Consumer Staples	842.2	0.74	1.40	1.12	9.00	27.88	1.81	21.81	2.46	0.25
Insurance	2,503.2	0.24	0.31	0.65	-2.50	9.18	1.36	13.19	3.18	1.01
Consumer Discretionary	1,696.5	1.31	1.20	0.97	-3.15	5.77				
Energy	1,060.2	-0.10	0.16	-0.15	1.65	11.72	0.87	10.24	5.50	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	413.2	-0.63	-1.87	-5.42	-7.10	-9.25				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

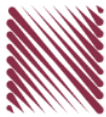
Oil prices ticked up early on Tuesday after Israel struck Rafah in Gaza while negotiations for a ceasefire with Hamas continued without resolution. Brent crude futures were up 46 cents, or 0.55%, at \$83.79 per barrel.

Kuwait Market

The market closed down by – 0.05% at 7,040.4 value traded 46.8 million KD, Premier market value reached 32.6 million KD down by – 0.15% at 7,655.2.

KSA Market

The market closed at stable level at 12,372.5.



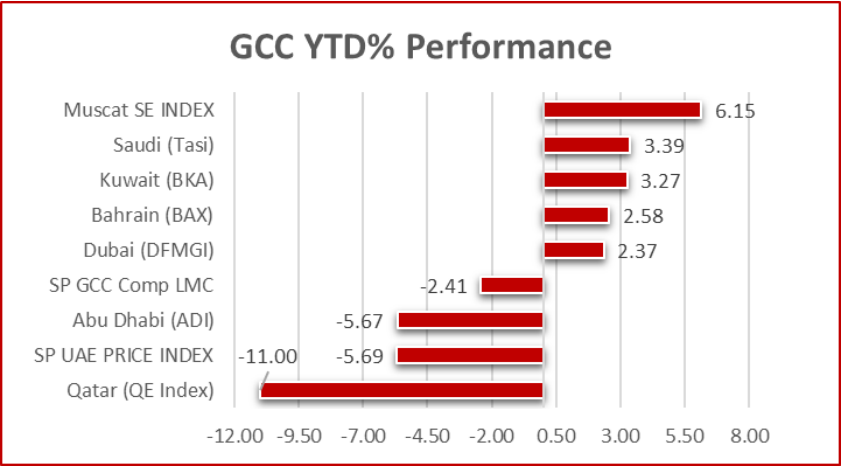
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.856	-0.47	-0.23	-1.04	-5.39	0.54	1.69	13.41	3.89	7.12
KFH	0.717	-0.42	0.00	-0.42	-1.82	7.65	2.10	21.10	2.56	12.26
ZAIN	0.486	-0.21	-0.41	-0.41	-1.42	-4.14	1.69	9.76	7.20	2.10
BOUBYAN BANK	0.590	0.34	0.34	0.17	1.20	4.23	2.48	31.48	1.28	2.48
AGILITY	0.311	1.63	-1.58	-1.58	-14.54	9.81	0.45	9.50	6.43	0.83
Saudi Arabia										
ARAMCO	29.95	-0.17	0.00	-0.50	-2.92	-9.24	4.72	16.00	5.66	7,248.67
SABIC	81.60	-0.37	-1.09	-3.43	4.21	-2.28	1.46	187.63	4.17	244.83
STC	37.80	1.34	1.34	0.40	-1.99	-3.93	2.39	14.22	4.23	189.02
AL-RAJHI BANK	80.30	-0.86	0.63	0.50	-2.43	-7.17	3.01	20.33	2.86	321.23
NCB	35.85	-2.45	-0.97	-4.65	-10.82	-7.24	1.21	11.09	4.88	215.12
Abu Dhabi										
ETISALAT.AD	16.10	-0.49	-0.49	-5.29	-12.31	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.20	0.16	0.16	-2.24	-7.72	-12.61	1.13	8.48	5.82	134.76
EMIRATES NBD	16.90	1.20	1.20	-0.59	-3.43	-2.31	0.99	4.92	7.10	106.73
DB ISLAMIC DB	5.63	-0.18	-0.18	1.26	-3.43	-1.57	0.95	6.27	7.99	40.76
EMAR.DU	7.95	1.92	1.92	-3.17	-2.69	0.38	0.90	5.92	6.29	70.26
Qatar										
QNB	13.990	-0.43	0.72	0.87	-1.69	-15.37	1.24	8.84	4.65	129.25
INDUSTREIS QAT	12.220	-0.89	-0.24	-0.24	2.26	-6.57	2.02	15.29	6.38	73.95
QA ISLAMIC BK	17.800	-0.56	-0.11	-2.73	-3.00	-17.21	1.47	10.17	4.07	42.07
MASRAF AL RAYA	2.438	0.08	0.33	-2.95	5.09	-8.17	0.94	15.89	4.10	22.68
MESAIEED PETRO	1.794	-0.88	-1.05	-6.51	-9.58	0.34	1.39	22.36	4.79	22.54
Oman										
BANK MUSCAT	0.263	0.38	0.00	0.38	0.38	-0.38	0.86	10.26	5.89	1.98
OMANTEL	1.061	0.57	0.66	1.53	3.01	0.09	1.23	24.32	5.66	0.80
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	0.00	3.85	5.06	3.85	-3.57	0.65	9.45	3.15	0.44
OMINVEST	0.373	-0.53	-0.53	-2.86	1.62	-5.64	0.81	7.61	5.36	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 down today by -0.05 %The leading sector bottom performance indices today are Utilities -0.63 % Real estate -0.45 % Banking -0.24 % respectively.

KSA

Saudi Armco have negative performance today by -0.17 %, SABIC have negative performance today by -0.36%. STC has a positive performance today by + 1.34 %, Al Rajhi Bank have negative performance today by -0.86 %



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