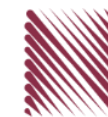


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 5th May 2024





Tuesday, May 7, 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)	12,358.0	-0.12	0.05	-0.30	-0.35	3.26	2.36	20.95	3.18	10,723.47
Qatar (QE Index)	9,618.6	-0.21	0.08	-1.11	-2.32	-11.19	1.12	10.96	4.93	484.72
Dubai (DFMGI)	4,156.3	0.01	0.33	0.01	-2.12	2.38	1.36	8.04	5.85	597.77
Abu Dhabi (ADI)	9,071.7	0.40	0.38	0.05	-1.69	-5.28	2.58	16.40	2.11	2,549.97
Bahrain (BAX)	2,023.8	0.07	-0.24	-0.26	-0.93	2.65	0.87	10.65	4.26	8.22
Muscat SE INDEX	4,778.6	-0.27	0.11	-0.12	3.08	5.86	0.81	10.30	5.47	6.63
SP GCC Comp LMC	180.4	-0.05	0.08	-0.72	-2.70	-2.46	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.3	0.20	0.55	-0.63	-3.26	-5.50				
Developed Markets										
MSCI World Index	3,401.8	0.31	1.20	2.92	-1.05	7.34				
U.S. (S&P 500)	5,187.7	0.13	1.17	3.02	-1.27	8.76	4.29	25.47	1.71	45,799.34
U.K. (FTSE 100)	8,313.7	1.22	1.22	2.08	4.54	7.51	1.77	14.15	3.67	2,196.84
Japan (topix)	2,746.2	0.65	0.65	0.11	-0.81	16.05	1.56	15.53	2.02	973,766.37
Emerging Markets										
MSCI EM Index	1,068.3	0.14	0.64	2.13	2.40	4.35				
China (SSE Composite)	3,147.7	0.22	1.38	1.38	3.50	5.81	1.36	12.00		44,025.04
India (Sensex)	73,511.9	-0.52	-0.50	-1.30	-0.19	1.76	4.77	22.32	1.15	145,585.06
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,026.4	-0.20	-0.10	-0.35	-4.11	3.07	1.44	15.16	3.62	42.41
Kuwait Premier Index	7,645.6	-0.13	-0.07	-0.60	-4.87	2.25	1.56	16.40	3.46	34.86
Kuwait Main Index	5,971.1	-0.55	-0.24	0.87	-0.24	7.21	1.05	10.81	4.40	7.56
Kuwait Sector										
Banking	1,722.6	-0.09	0.01	-0.48	-2.77	4.56	1.71	17.14	3.08	25.82
Telecom	1,044.4	-0.81	-0.82	0.06	-1.94	-5.50	1.54	11.46	7.98	3.22
Industrials	755.3	-0.94	-1.39	-1.69	-27.75	-16.81	0.80	11.63	5.66	2.58
Financial Services	1,342.1	-0.13	0.17	0.66	-0.84	10.71	1.07	13.25	2.97	4.50
Real Estate	1,284.6	0.02	-0.01	-0.09	-0.85	5.91	0.98	13.80	2.05	2.73
Basic Materials	843.7	0.07	0.77	-1.27	6.81	13.11	1.45	11.77	9.27	0.48
Health Care	475.0	0.00	-2.51	-2.51	38.26	-1.47	1.69	11.92	1.81	
Consumer Staples	840.1	-0.25	1.15	0.87	8.73	27.57	1.83	21.97	2.44	0.26
Insurance	2,495.0	-0.33	-0.02	0.32	-2.82	8.82	1.36	13.25	3.15	1.01
Consumer Discretionary	1,697.1	0.03	1.23	1.00	-3.11	5.81				
Energy	1,051.0	-0.87	-0.72	-1.02	0.77	10.75	0.87	10.21	5.49	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	413.2	0.00	-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 fell in early Asian trading hours on Wednesday after market sources said that data from the American Petroleum Institute showed an increase in U.S. crude and fuel stockpiles, an indicator of weak demand. Brent crude oil futures fell 21 cents, or 0.3%, to \$82.95 a barrel.

Kuwait Market

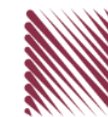
The market closed down by – 0.2% at 7,026.4 value traded 43.5 million KD, Premier market value reached 27.8 million KD down by – 0.13% at 7,645.6.

KSA Market

The market closed down by – 0.12% at 12,358.0.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield
Blue Chip Watch									
Kuwait									
NBK	0.851	-0.58	-0.82	-1.62	-5.94	-0.05	1.68	13.33	3.92
KFH	0.720	0.42	0.42	0.00	-1.41	8.10	2.11	21.19	2.55
ZAIN	0.480	-1.23	-1.64	-1.64	-2.64	-5.33	1.67	9.64	7.29
BOUBYAN BANK	0.591	0.17	0.51	0.34	1.37	4.41	2.49	31.54	1.28
AGILITY	0.306	-1.61	-3.16	-3.16	-15.91	8.04	0.44	9.35	6.54
Saudi Arabia									
ARAMCO	29.95	0.00	0.00	-0.50	-2.92	-9.24	4.72	16.00	6.26
SABIC	80.70	-1.10	-2.18	-4.50	3.07	-3.35	1.45	185.56	4.21
STC	37.50	-0.79	0.54	-0.40	-2.77	-4.69	2.37	14.10	4.27
AL-RAJHI BANK	80.80	0.62	1.25	1.13	-1.82	-6.59	3.03	20.46	2.85
NCB	36.15	0.84	-0.14	-3.86	-10.07	-6.47	1.22	11.18	4.84
Abu Dhabi									
ETISALAT.AD	16.16	0.37	-0.12	-4.94	-11.98	-17.72	3.23	13.45	4.95
FAB.AD	12.40	1.64	1.81	-0.64	-6.20	-11.17	1.15	8.62	5.73
EMIRATES NBD	16.85	-0.30	0.90	-0.88	-3.71	-2.60	0.98	4.91	7.12
DB ISLAMIC DB	5.63	0.00	-0.18	1.26	-3.43	-1.57	0.95	6.27	7.99
EMAR.DU	8.00	0.63	2.56	-2.56	-2.08	1.01	0.91	5.96	6.25
Qatar									
QNB	13.920	-0.50	0.22	0.36	-2.18	-15.79	1.23	8.79	4.67
INDUSTREIS QAT	12.100	-0.98	-1.22	-1.22	1.26	-7.49	2.00	15.14	6.45
QA ISLAMIC BK	17.730	-0.39	-0.51	-3.11	-3.38	-17.53	1.46	10.13	4.09
MASRAF AL RAYA	2.420	-0.74	-0.41	-3.66	4.31	-8.85	0.94	15.77	4.13
MESAIEED PETRO	1.797	0.17	-0.88	-6.36	-9.43	0.50	1.39	22.40	4.79
Oman									
BANK MUSCAT	0.262	-0.38	-0.38	0.00	0.00	-0.76	0.86	10.22	5.92
OMANTEL	1.062	0.09	0.76	1.63	3.11	0.19	1.23	24.34	5.65
BANK DHOFAR	0.158	-1.25	-1.25	-1.25	-1.25	-1.25	0.66	15.67	4.91
NAT BANK OF OMAN	0.270	0.00	3.85	5.06	3.85	-3.57	0.65	9.45	3.15
OMINVEST	0.375	0.54	0.00	-2.34	2.16	-5.13	0.82	7.65	5.33

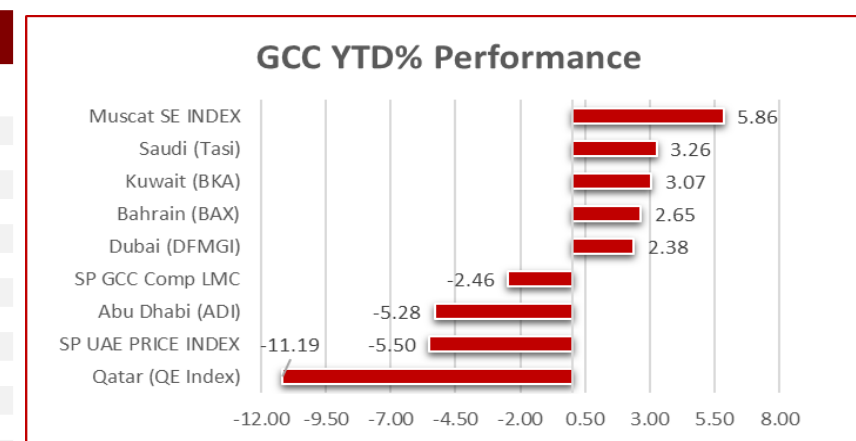
* GCC Markets performance at the latest close.

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 down today by -0.2 %The leading sector bottom performance indices today are Industrials -0.94 % Energy -0.87 % Telecom -0.81 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -1.1%. STC have negative performance today by -0.79 %, Al Rajhi Bank has a positive performance today by + 0.62 %.



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