

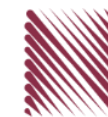


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 8th May 2024



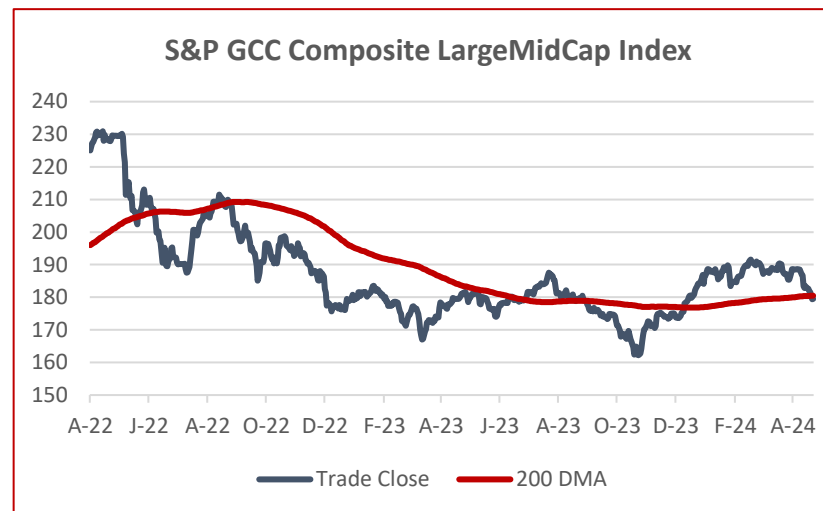


Wednesday, May 8, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,460.1	0.83	0.87	0.53	0.47	4.12	2.37	21.07	3.16	10,769.69
Qatar (QE Index)	9,623.0	0.05	0.13	-1.07	-2.28	-11.15	1.12	10.98	4.92	485.36
Dubai (DFMGI)	4,193.4	0.89	1.22	0.90	-1.25	3.29	1.37	8.12	5.79	602.63
Abu Dhabi (ADI)	9,177.3	1.16	1.55	1.21	-0.55	-4.18	2.61	16.59	2.08	2,572.07
Bahrain (BAX)	2,027.0	0.16	-0.08	-0.10	-0.77	2.81	0.87	10.65	4.26	8.23
Muscat SE INDEX	4,757.5	-0.44	-0.33	-0.56	2.63	5.39	0.82	10.11	5.72	6.60
SP GCC Comp LMC	181.5	0.61	0.69	-0.12	-2.10	-1.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	131.8	1.20	1.75	0.56	-2.10	-4.37				
Developed Markets										
MSCI World Index	3,395.6	-0.18	1.02	2.73	-1.23	7.15				
U.S. (S&P 500)	5,187.7	0.00	1.17	3.02	-1.27	8.76	4.31	25.47	1.70	45,897.34
U.K. (FTSE 100)	8,354.1	0.49	1.71	2.58	5.05	8.03	1.78	14.22	3.66	2,206.46
Japan (topix)	2,706.4	-1.45	-0.81	-1.34	-2.25	14.37	1.53	15.16	2.06	960,501.95
Emerging Markets										
MSCI EM Index	1,066.6	-0.15	0.49	1.98	2.24	4.19				
China (SSE Composite)	3,128.5	-0.61	0.76	0.76	2.87	5.16	1.36	12.00		44,025.04
India (Sensex)	73,466.4	-0.06	-0.56	-1.36	-0.25	1.70	4.76	22.30	1.15	145,667.35

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,059.2	0.47	0.37	0.12	-3.66	3.55	1.43	15.11	3.63	42.32
Kuwait Premier Index	7,689.9	0.58	0.51	-0.02	-4.32	2.85	1.56	16.35	3.47	34.81
Kuwait Main Index	5,966.1	-0.08	-0.32	0.78	-0.32	7.12	1.04	10.72	4.43	7.51
Kuwait Sector										
Banking	1,732.9	0.60	0.61	0.12	-2.19	5.18	1.71	17.12	3.08	25.80
Telecom	1,044.8	0.04	-0.79	0.10	-1.91	-5.46	1.53	11.36	8.05	3.19
Industrials	756.9	0.22	-1.18	-1.48	-27.59	-16.63	0.80	11.56	5.72	2.56
Financial Services	1,346.7	0.34	0.51	1.00	-0.51	11.09	1.07	13.05	2.98	4.49
Real Estate	1,303.3	1.45	1.44	1.36	0.59	7.45	0.98	13.76	2.05	2.73
Basic Materials	836.0	-0.92	-0.15	-2.18	5.83	12.07	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	846.6	0.77	1.93	1.65	9.57	28.55	1.82	21.92	2.45	0.26
Insurance	2,467.6	-1.10	-1.12	-0.78	-3.89	7.62	1.36	13.24	3.19	1.01
Consumer Discretionary	1,687.8	-0.55	0.67	0.45	-3.65	5.23				
Energy	1,053.1	0.20	-0.51	-0.82	0.97	10.97	0.86	10.10	5.55	0.22
Technology	1,906.1	0.00	0.00	0.00	0.00	229.56	2.35			0.03
Utilities	415.8	0.64	-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 prices rose in early trade on Thursday as shrinking U.S. crude inventories signaled tighter supply, and amid rising hopes that the Federal Reserve would cut interest rates by the end of the year. Brent crude futures for July rose 23 cents to \$83.81 a barrel.

Kuwait Market

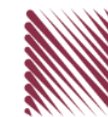
The market closed up by + 0.47% at 7,059.2 value traded 59.0 million KD, Premier market value reached 37.7 million KD up by + 0.58% at 7,689.9.

KSA Market

The market closed up by + 0.83% at 12,460.1.

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	0.853	0.24	-0.58	-1.39	-5.72	0.18	1.68	13.36	3.91	7.09
KFH	0.727	0.97	1.39	0.97	-0.45	9.15	2.13	21.39	2.52	12.42
ZAIN	0.480	0.00	-1.64	-1.64	-2.64	-5.33	1.67	9.64	7.29	2.07
BOUBYAN BANK	0.592	0.17	0.68	0.51	1.54	4.59	2.49	31.59	1.27	2.48
AGILITY	0.309	0.98	-2.22	-2.22	-15.09	9.10	0.44	9.44	6.47	0.83
Saudi Arabia										
ARAMCO	29.95	0.00	0.00	-0.50	-2.92	-9.24	4.76	16.52	6.26	7,248.09
SABIC	81.40	0.87	-1.33	-3.67	3.96	-2.51	1.46	187.17	4.18	244.21
STC	38.15	1.73	2.28	1.33	-1.08	-3.04	2.41	14.35	4.19	190.76
AL-RAJHI BANK	80.30	-0.62	0.63	0.50	-2.43	-7.17	2.97	19.75	2.86	321.21
NCB	35.95	-0.55	-0.69	-4.39	-10.57	-6.99	1.19	11.10	4.87	215.71
Abu Dhabi										
ETISALAT.AD	16.88	4.46	4.33	-0.71	-8.06	-14.05	3.37	14.05	4.74	146.78
FAB.AD	12.60	1.61	3.45	0.96	-4.69	-9.74	1.16	8.75	5.63	139.18
EMIRATES NBD	16.95	0.59	1.50	-0.29	-3.14	-2.02	0.99	4.94	7.08	107.05
DB ISLAMIC DB	5.71	1.42	1.24	2.70	-2.06	-0.17	0.97	6.36	7.88	41.34
EMAR.DU	8.19	2.37	5.00	-0.24	0.24	3.41	0.93	6.10	6.11	72.38
Qatar										
QNB	14.050	0.93	1.15	1.30	-1.26	-15.00	1.24	8.87	4.63	129.77
INDUSTREIS QAT	12.010	-0.74	-1.96	-1.96	0.50	-8.18	1.99	15.03	6.49	72.66
QA ISLAMIC BK	17.800	0.39	-0.11	-2.73	-3.00	-17.21	1.47	10.17	4.07	42.06
MASRAF AL RAYA	2.417	-0.12	-0.53	-3.78	4.18	-8.96	0.94	15.75	4.14	22.48
MESAIEED PETRO	1.780	-0.95	-1.82	-7.24	-10.28	-0.45	1.38	22.19	4.83	22.36
Oman										
BANK MUSCAT	0.261	-0.38	-0.76	-0.38	-0.38	-1.14	0.85	10.18	5.94	1.96
OMANTEL	1.050	-1.13	-0.38	0.48	1.94	-0.94	1.22	24.07	5.71	0.79
BANK DHOFAR	0.158	0.00	-1.25	-1.25	-1.25	-1.25	0.66	15.67	4.91	0.47
NAT BANK OF OMAN	0.271	0.37	4.23	5.45	4.23	-3.21	0.65	9.49	3.14	0.44
OMINVEST	0.375	0.00	0.00	-2.34	2.16	-5.13	0.82	7.65	5.33	0.25

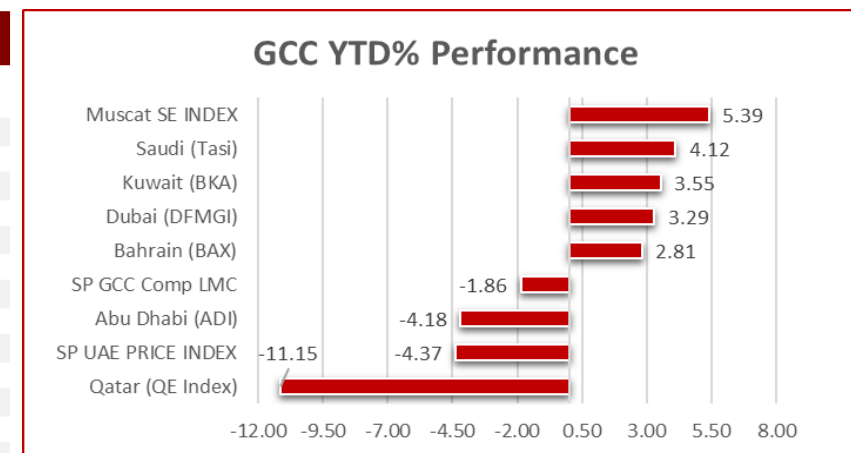
* GCC Markets performance at the latest close.

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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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.47 %The leading sector best performance indices today are Real estate 1.45 % Consumer services 0.77 % Utilities 0.64 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.86%, STC has a positive performance today by + 1.73 %, Al Rajhi Bank have negative performance today by -0.62 %.



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