

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 10th July 2024

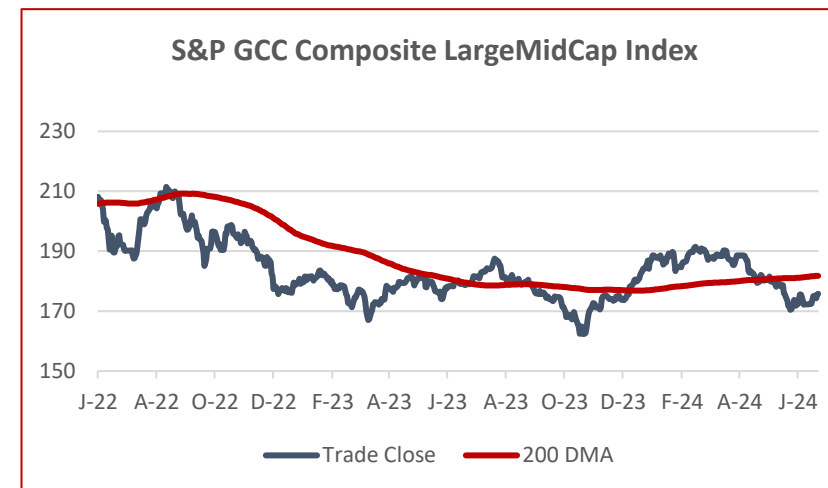




Wednesday, July 10, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,784.1	0.04	1.08	0.90	0.90	-1.53	3.06	24.25	3.27	10,131.82
Qatar (QE Index)	10,161.6	-0.04	0.88	1.95	1.95	-6.18	1.18	11.52	4.66	512.15
Dubai (DFMGI)	4,080.2	0.05	0.25	1.25	1.25	0.50	1.42	8.36	5.90	606.76
Abu Dhabi (ADI)	9,138.5	0.03	0.00	0.86	0.86	-4.59	2.64	16.43	2.10	2,545.59
Bahrain (BAX)	1,994.6	-0.26	-0.40	-1.53	-1.53	1.17	0.89	11.38	4.45	7.71
Muscat SE INDEX	4,695.6	0.11	0.14	0.18	0.18	4.02	0.83	10.17	5.84	7.28
SP GCC Comp LMC	176.7	-0.06	1.00	0.98	0.98	-4.45	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.0	0.13	0.46	1.01	1.01	-6.43				
Developed Markets										
MSCI World Index	3,613.6	0.96	0.91	2.90	2.90	14.02				
U.S. (S&P 500)	5,633.9	1.02	1.20	3.18	3.18	18.12	4.64	27.33	1.59	49,516.81
U.K. (FTSE 100)	8,193.5	0.66	-0.13	0.36	0.36	5.95	1.74	14.73	3.72	2,135.96
Japan (topix)	2,909.2	0.47	0.87	3.54	3.54	22.94	1.52	16.10	1.99	1,020,515.78
Emerging Markets										
MSCI EM Index	1,111.2	-0.04	0.57	2.30	2.30	8.55				
China (SSE Composite)	2,939.4	-0.68	-0.36	-0.94	-0.94	-1.20	1.36	12.00		44,025.04
India (Sensex)	79,924.8	-0.53	-0.09	1.13	1.13	10.64	5.01	23.77	1.13	157,808.21
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,060.2	-0.30	1.09	1.78	1.78	3.56	1.45	15.19	3.62	42.62
Kuwait Premier Index	7,717.8	-0.25	1.52	2.31	2.31	3.22	1.58	16.63	3.43	35.38
Kuwait Main Index	5,865.5	-0.57	-0.99	-0.79	-0.79	5.31	1.03	10.27	4.60	7.24
Kuwait Sector										
Banking	1,745.6	-0.39	1.21	1.96	1.96	5.96	1.74	17.40	3.03	26.24
Telecom	989.8	-0.87	0.31	0.62	0.62	-10.44	1.46	11.90	8.42	3.05
Industrials	795.0	0.62	1.41	2.90	2.90	-12.44	0.84	11.79	5.47	2.67
Financial Services	1,340.7	-0.35	1.59	2.24	2.24	10.60	1.10	12.07	2.96	4.48
Real Estate	1,357.3	0.78	3.24	4.77	4.77	11.91	1.03	14.50	2.03	2.86
Basic Materials	751.9	0.04	-0.07	-0.48	-0.48	0.79	1.35	13.18	11.66	0.42
Health Care	435.8	-0.19	-1.32	-1.32	-1.32	-9.62	1.46	12.96	1.97	
Consumer Staples	895.0	1.20	4.10	8.56	8.56	35.89	1.92	19.63	2.32	0.27
Insurance	2,232.0	-0.74	-6.28	-11.42	-11.42	-2.65	1.23	11.03	3.53	0.91
Consumer Discretionary	1,553.4	-1.24	-0.31	0.87	0.87	-3.15				
Energy	1,031.9	-2.22	-2.41	0.16	0.16	8.74	0.90	9.80	6.39	0.21
Technology	1,673.3	0.00	0.00	5.50	5.50	189.31	1.94	277.11		0.02
Utilities	434.2	-0.60	0.61	3.13	3.13	-4.62				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged higher on Thursday as crude stocks fell after U.S. refineries ramped up processing and as gasoline inventories eased, signaling stronger demand. Brent futures rose 35 cents, or 0.4% to \$85.43 a barrel.

Kuwait Market

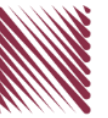
The market closed down by – 0.3% at 7,060.2 value traded 40.6 million KD, Premier market value reached 29.9 million KD down by – 0.25% at 7,717.8.

KSA Market

The market closed up by + 0.04% at 11,784.1.

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	0.856	-0.81	0.71	0.00	0.00	0.54	1.69	12.93	3.89	7.07
KFH	0.724	0.14	1.54	2.70	2.70	8.70	2.12	21.31	2.53	12.10
ZAIN	0.450	-1.10	0.00	0.90	0.90	-11.24	1.57	10.22	7.78	1.94
BOUBYAN BANK	0.578	-0.69	1.40	2.48	2.48	2.11	2.43	30.84	1.31	2.36
AGILITY	0.288	0.70	4.35	3.23	3.23	1.69	0.78	8.46	6.94	0.75
Saudi Arabia										
ARAMCO	28.10	-0.18	-0.35	0.72	0.72	-14.85	4.46	15.50	6.67	6,774.01
SABIC	74.00	0.27	0.00	0.27	0.27	-11.38	1.33	194.11	4.46	221.93
STC	38.65	0.13	1.84	1.44	1.44	-1.77	2.39	14.34	4.14	189.94
AL-RAJHI BANK	80.50	-0.37	1.13	0.63	0.63	-6.94	2.97	20.07	2.86	319.91
NCB	36.05	-0.41	2.12	-0.55	-0.55	-6.73	1.19	11.13	4.85	216.84
Abu Dhabi										
ETISALAT.AD	16.08	0.25	0.50	-0.12	-0.12	-18.13	3.21	13.39	4.98	141.05
FAB.AD	12.44	-0.48	-0.48	-0.16	-0.16	-10.89	1.15	8.64	5.71	139.19
EMIRATES NBD	16.65	-0.60	0.91	0.91	0.91	-3.76	0.97	4.85	7.21	104.53
DB ISLAMIC DB	5.80	-0.17	-0.68	1.05	1.05	1.40	0.98	6.46	7.76	41.63
EMAR.DU	8.05	-0.25	0.63	-1.83	-1.83	1.64	0.90	6.27	6.21	71.94
Qatar										
QNB	15.080	0.53	1.55	2.94	2.94	-8.77	1.28	9.34	4.34	136.51
INDUSTREIS QAT	13.230	0.23	0.84	2.72	2.72	1.15	2.19	16.56	5.90	78.59
QA ISLAMIC BK	19.750	-0.25	2.07	6.18	6.18	-8.14	1.63	11.28	3.67	44.90
MASRAF AL RAYA	2.326	-0.17	1.00	-0.13	-0.13	-12.39	0.90	15.16	4.30	21.21
MESAIEED PETRO	1.672	-1.07	-0.06	1.64	1.64	-6.49	1.30	20.84	5.14	20.65
Oman										
BANK MUSCAT	0.25	-0.40	-0.40	-0.40	-0.40	-5.30	0.82	9.75	6.20	1.88
OMANTEL	1.007	0.20	-0.69	-0.79	-0.79	-5.00	1.23	11.37	5.96	0.76
BANK DHOFAR	0.160	0.00	0.00	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.260	1.56	1.56	2.77	2.77	-7.14	0.63	9.10	3.27	0.41
OMINVEST	0.344	-0.29	1.18	-3.10	-3.10	-12.98	0.73	7.47	5.81	0.23

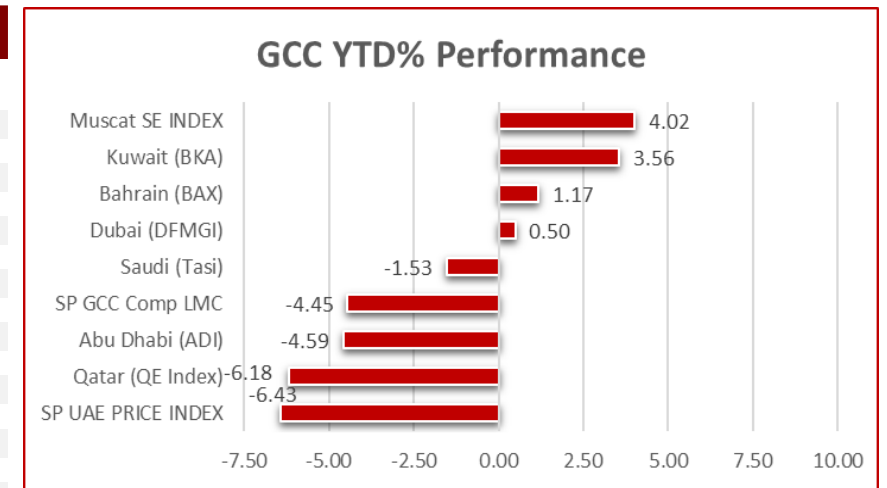
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Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%
03-July-24	24.48%	13.69%	0.06%	2.36%	6.29%	17.67%	12.97%	6.0%	5.60%

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 -0.3 %The leading sector bottom performance indices today are Energy -2.22 % Consumer Disc -1.24 % Telecom -0.87 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have positive performance today by + 0.27%, STC has a positive performance today by + 0.13 %, Al Rajhi Bank have negative performance today by -0.37 %.



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