

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

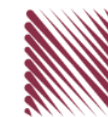
GCC DAILY MORNING BRIEF

Thursday, 10th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,927.3	-0.83	-0.25	-2.44	-2.44	-0.33	2.89	22.00	3.44	10,002.07
Qatar (QE Index)	10,509.8	-0.02	0.43	-0.98	-0.98	-2.96	1.23	11.87	4.26	533.18
Dubai (DFMGI)	4,422.3	-0.15	0.37	-1.80	-1.80	8.93	1.56	8.73	5.38	671.66
Abu Dhabi (ADI)	9,282.5	0.26	1.12	-1.52	-1.52	-3.08	2.68	16.87	2.07	2,625.22
Bahrain (BAX)	1,999.5	0.02	-0.34	-0.66	-0.66	1.42	0.91	10.40	4.57	7.75
Muscat SE INDEX	4,742.9	1.20	1.48	0.69	0.69	5.07	0.84	10.05	5.77	7.37
SP GCC Comp LMC	181.7	-0.57	0.50	-2.13	-2.13	-1.78	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.6	-0.08	1.71	-2.34	-2.34	0.58				
Developed Markets										
MSCI World Index	3,716.2	0.59	0.48	-0.18	-0.18	17.26				
U.S. (S&P 500)	5,792.0	0.71	0.71	0.51	0.51	21.43	4.77	27.51	1.55	51,184.12
U.K. (FTSE 100)	8,243.7	0.65	-0.45	0.08	0.08	6.60	1.74	15.01	3.72	2,142.53
Japan (topix)	2,707.2	0.30	0.49	2.32	2.32	14.40	1.41	14.73	2.15	953,186.50
Emerging Markets										
MSCI EM Index	1,148.3	-0.69	-2.63	-1.93	-1.93	12.16				
China (SSE Composite)	3,258.9	-6.62	-2.33	-2.33	-2.33	9.54	1.36	12.00		44,025.04
India (Sensex)	81,467.1	-0.21	-0.27	-3.36	-3.36	12.77	4.35	23.63	1.12	161,916.51

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,045.9	0.14	0.14	-1.27	-1.27	3.35	1.44	15.10	4.00	42.36
Kuwait Premier Index	7,577.1	0.08	-0.08	-1.71	-1.71	1.34	1.54	16.17	3.85	34.61
Kuwait Main Index	6,325.1	0.42	1.13	0.77	0.77	13.56	1.11	11.36	4.77	7.75
Kuwait Sector										
Banking	1,723.5	-0.14	0.07	-1.69	-1.69	4.61	1.71	17.08	3.17	25.85
Telecom	1,005.3	-0.41	-1.24	-2.22	-2.22	-9.04	1.48	12.18	8.33	3.08
Industrials	722.9	1.61	0.61	-0.37	-0.37	-20.38	0.76	11.04	9.93	2.41
Financial Services	1,401.2	1.04	0.88	-0.67	-0.67	15.59	1.14	12.36	2.97	4.64
Real Estate	1,384.8	0.29	0.82	0.67	0.67	14.18	1.06	15.11	2.06	2.93
Basic Materials	829.0	2.21	3.75	2.69	2.69	11.13	1.46	12.31	10.80	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,003.5	-0.06	-0.34	-0.03	-0.03	52.37	2.18	20.71	2.05	0.31
Insurance	2,034.2	-2.55	-2.26	-2.37	-2.37	-11.28	1.14	11.36	3.80	0.84
Consumer Discretionary	1,819.9	2.53	1.15	0.75	0.75	13.47				
Energy	1,101.8	-0.27	-1.42	-1.41	-1.41	16.10	0.94	9.37	5.73	0.22
Technology	1,113.1	-4.38	-16.85	-23.12	-23.12	92.45	1.35	484.85		0.02
Utilities	384.2	-2.01	-2.01	-1.35	-1.35	-15.61				

International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose in early Asian trade on Thursday on concerns about potential supply disruptions in the Middle East, with Israel planning to strike oil-producer Iran, and on spikes in fuel demand as a major storm barreled into Florida. Brent crude futures rose 37 cents, or 0.5%, to \$76.95 a barrel.

Kuwait Market

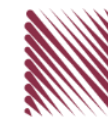
The market up by 0.14% at 7,045.9 value traded 73.9 million KD, Premier market value reached 34.8 million KD up by 0.08% at 7,577.1.

KSA Market

The market closed down by -0.83% at 11,927.3.

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	0.865	0.00	0.70	-2.04	-2.04	1.59	1.65	12.96	3.91	7.20
KFH	0.708	-0.14	0.28	-1.12	-1.12	6.30	2.04	19.76	2.71	12.11
ZAIN	0.460	-0.43	-1.71	-3.16	-3.16	-9.27	1.73	10.75	7.61	1.99
BOUBYAN BANK	0.538	-0.37	-4.44	-5.61	-5.61	-4.95	2.22	27.34	1.40	2.26
AGILITY	0.217	0.46	0.46	-0.91	-0.91	-23.38	0.63	7.02	9.22	0.58
Saudi Arabia										
ARAMCO	26.95	-0.37	-0.37	-0.55	-0.55	-18.33	4.32	14.96	7.05	6,518.43
SABIC	73.10	-1.08	-1.35	-2.40	-2.40	-12.46	1.34	114.05	4.51	219.18
STC	42.05	-0.71	-1.06	-3.78	-3.78	6.87	2.74	15.27	3.80	210.14
AL-RAJHI BANK	84.00	-1.98	-0.12	-3.67	-3.67	-2.89	2.89	20.25	2.86	335.82
NCB	34.95	0.14	4.33	1.90	1.90	-9.57	1.16	10.69	5.15	209.59
Abu Dhabi										
ETISALAT.AD	17.88	-0.89	2.05	-3.35	-3.35	-8.96	3.55	14.02	4.56	155.49
FAB.AD	13.34	0.15	3.41	-2.91	-2.91	-4.44	1.20	9.24	5.32	147.37
EMIRATES NBD	20.00	-0.99	0.25	-1.48	-1.48	15.61	1.09	5.61	6.00	126.33
DB ISLAMIC DB	6.11	-0.49	0.33	-3.02	-3.02	6.82	1.00	6.70	7.36	44.24
EMAR.DU	8.43	-0.35	2.93	-3.33	-3.33	6.44	0.96	6.20	5.93	74.51
Qatar										
QNB	17.310	0.52	2.18	2.12	2.12	4.72	1.43	10.52	3.78	159.88
INDUSTREIS QAT	13.070	0.31	0.15	0.23	0.23	-0.08	2.10	15.17	5.36	79.07
QA ISLAMIC BK	20.900	0.48	0.00	-2.11	-2.11	-2.79	1.66	11.77	2.93	49.39
MASRAF AL RAYA	2.372	-0.55	-1.17	-3.97	-3.97	-10.66	0.90	15.43	4.22	22.06
MESAIEED PETRO	1.642	-0.61	0.61	0.74	0.74	-8.17	1.26	23.02	4.26	20.63
Oman										
BANK MUSCAT	0.257	0.78	2.39	1.98	1.98	-2.65	0.82	9.79	6.03	1.93
OMANTEL	0.984	0.10	0.31	-0.30	-0.30	-7.17	1.19	11.51	6.10	0.74
BANK DHOFAR	0.165	5.10	5.10	5.10	5.10	3.13	0.68	15.58	4.70	0.49
NAT BANK OF OMAN	0.295	1.72	1.72	1.72	1.72	5.36	0.70	10.24	2.88	0.48
OMINVEST	0.345	0.00	-1.43	-1.99	-1.99	-12.72	0.76	8.32	5.80	0.23

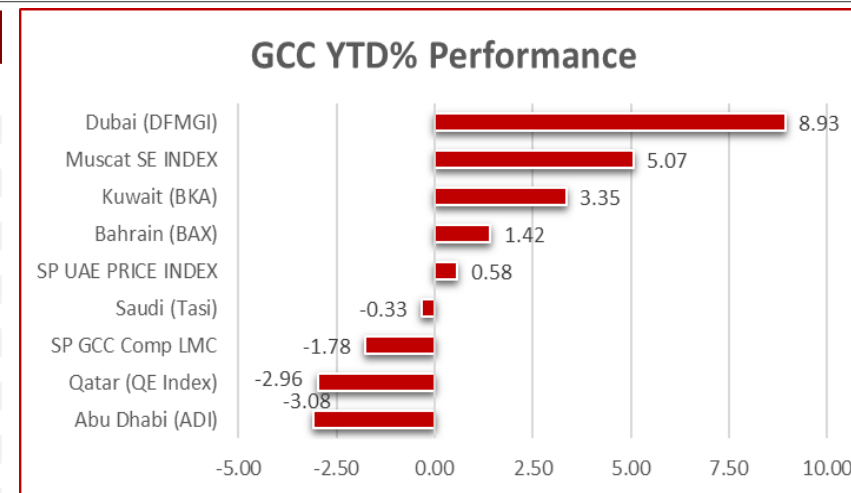
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
02-October. 24	24.76%	15.65%	0.06%	3.74%	7.96%	17.62%	13.06%	6.0%	5.85%
09-October. 24	24.73%	15.67%	0.06%	3.73%	7.96%	17.61%	12.99%	6.03%	5.84%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.14 %The leading sector best performance indices today are Consumer Disc 2.53 % Basic materials 2.21 % Industrials 1.61 % respectively.

KSA

Saudi Armco have negative performance today by -0.37 %, SABIC have negative performance today by -1.0%, STC have negative performance today by -0.71 %, Al Rajhi Bank have negative performance today by -1.98 %.



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