



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday ,11th August 2024

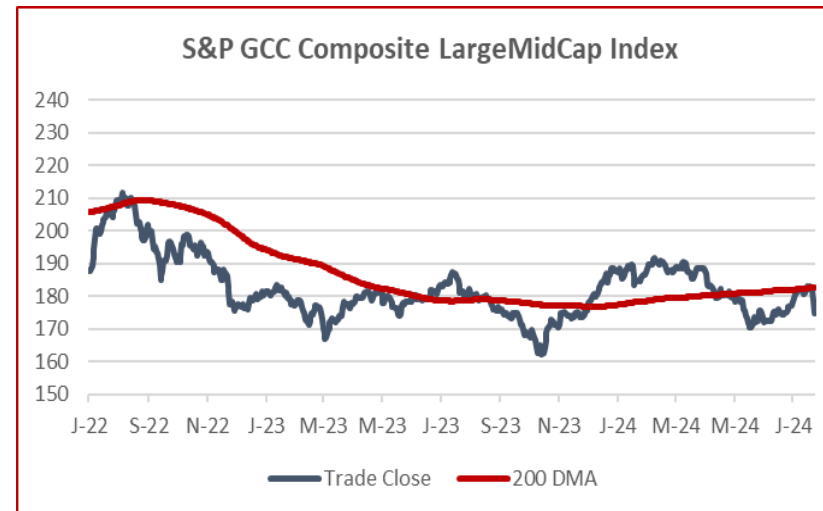




Sunday, August 11, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,771.7	0.90	0.90	-2.79	0.79	-1.64	2.92	22.30	3.34	10,088.29
Qatar (QE Index)	10,077.3	0.24	0.24	-0.76	1.10	-6.96	1.17	11.35	4.60	508.70
Dubai (DFMGI)	4,195.2	-0.02	-0.99	-1.71	4.10	3.33	1.46	8.41	5.77	633.77
Abu Dhabi (ADI)	9,305.6	0.55	0.14	-0.36	2.70	-2.84	2.69	16.95	2.08	2,563.20
Bahrain (BAX)	1,932.2	1.12	1.12	-1.91	-4.61	-1.99	0.86	10.92	4.67	7.47
Muscat SE INDEX	4,659.5	0.31	0.31	-0.05	-0.59	3.22	0.83	9.85	5.87	7.24
SP GCC Comp LMC	179.3	0.70	0.70	-1.97	2.47	-3.04	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.0	0.00	0.00	-1.09	4.96	-2.78				
Developed Markets										
MSCI World Index	3,447.8	0.58	-0.03	-3.47	-1.82	8.79				
U.S. (S&P 500)	5,344.2	0.47	-0.04	-3.23	-2.13	12.04	4.41	25.47	1.64	47,298.75
U.K. (FTSE 100)	8,168.1	0.28	-0.08	-2.39	0.05	5.62	1.72	14.77	3.76	2,125.58
Japan (topix)	2,483.3	0.88	-2.14	-11.13	-11.61	4.94	1.30	13.58	2.33	874,627.79
Emerging Markets										
MSCI EM Index	1,063.4	1.64	0.21	-1.97	-2.10	3.88				
China (SSE Composite)	2,862.2	-0.27	-1.48	-2.61	-3.55	-3.79	1.36	12.00		44,025.04
India (Sensex)	79,705.9	1.04	-1.58	-2.49	0.85	10.33	4.40	23.26	1.15	158,148.33
Kuwait										
Kuwait All Share Index	7,111.1	0.64	0.64	-1.77	2.51	4.31	1.45	15.07	3.67	42.53
Kuwait Premier Index	7,748.0	0.66	0.66	-1.92	2.71	3.62	1.57	16.43	3.50	35.19
Kuwait Main Index	6,004.0	0.55	0.55	-1.06	1.55	7.80	1.05	10.41	4.54	7.34
Kuwait Sector										
Banking	1,767.5	0.75	0.75	-2.04	3.24	7.29	1.74	17.36	3.09	26.27
Telecom	980.3	-0.24	-0.24	-1.21	-0.34	-11.30	1.44	11.62	8.55	3.00
Industrials	763.4	0.12	0.12	-2.74	-1.19	-15.91	0.81	11.38	5.66	2.58
Financial Services	1,349.5	0.99	0.99	-1.10	2.92	11.33	1.10	11.69	2.96	4.47
Real Estate	1,319.3	0.79	0.79	-1.06	1.83	8.77	1.01	14.31	2.09	2.77
Basic Materials	751.8	0.67	0.67	0.24	-0.49	0.79	1.34	13.10	11.73	0.42
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	1,025.4	0.30	0.30	4.35	24.38	55.70	2.22	21.05	2.01	0.31
Insurance	2,300.8	-0.71	-0.71	-3.08	-8.69	0.35	1.26	11.27	3.42	0.94
Consumer Discretionary	1,685.5	1.52	1.52	-0.47	9.45	5.09				
Energy	1,050.1	0.15	0.15	-2.14	1.93	10.66	0.90	9.76	6.30	0.21
Technology	1,549.6	0.00	0.00	-4.91	-2.29	167.92	1.80	256.63		0.02
Utilities	410.5	0.65	0.65	-3.10	-2.50	-9.83				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were little changed in early Asian trading on Monday, holding on to most of last week's more than 3% gains, supported by geopolitical tensions and better economic data. Brent crude futures fell 7 cents, or 0.09%, to \$79.59 a barrel.

Kuwait Market

The market closed up by +0.64% at 7,111.1 value traded 46.5 million KD, Premier market value reached 35.9 million KD up by +0.66% at 7,748.0.

KSA Market

The market closed up by +0.90% at 11,771.7

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	0.874	0.58	0.58	-3.43	2.10	2.65	1.67	13.10	3.87	7.30
KFH	0.726	0.83	0.83	-1.49	2.98	9.00	2.10	20.26	2.64	12.46
ZAIN	0.451	-0.44	-0.44	-0.88	1.12	-11.05	1.70	10.54	7.76	1.96
BOUBYAN BANK	0.586	0.34	0.34	-1.01	3.90	3.53	2.42	29.78	1.29	2.47
AGILITY	0.263	-0.75	-0.75	-4.01	-5.73	-7.14	0.71	7.72	7.60	0.71
Saudi Arabia										
ARAMCO	27.95	0.72	0.72	1.27	0.18	-15.30	4.48	15.51	6.80	6,758.85
SABIC	75.10	0.13	0.13	-4.70	1.76	-10.06	1.37	117.17	4.39	225.13
STC	38.00	-0.13	-0.13	-1.30	-0.26	-3.42	2.48	13.80	4.21	189.86
AL-RAJHI BANK	86.00	0.23	0.23	0.47	7.50	-0.58	2.96	20.74	2.79	343.74
NCB	35.50	2.31	2.31	-6.58	-2.07	-8.15	1.18	10.85	5.07	212.84
Abu Dhabi										
ETISALAT.AD	17.08	-2.40	1.43	4.27	6.09	-13.03	3.39	13.39	4.77	148.52
FAB.AD	13.42	2.44	2.44	2.91	7.70	-3.87	1.20	9.30	5.29	148.24
EMIRATES NBD	19.35	-0.51	1.57	1.31	17.27	11.85	1.05	5.43	6.20	122.21
DB ISLAMIC DB	5.83	0.00	-1.52	-0.34	1.57	1.92	0.95	6.39	7.72	42.21
EMAR.DU	8.15	-1.09	-2.86	-5.56	-0.61	2.90	0.91	6.35	6.13	72.03
Qatar										
QNB	15.340	0.26	0.26	0.33	4.71	-7.20	1.30	9.50	4.27	141.78
INDUSTREIS QAT	12.990	0.15	0.15	-0.76	0.85	-0.69	2.15	16.26	6.00	78.64
QA ISLAMIC BK	19.520	-0.15	-0.15	-0.91	4.95	-9.21	1.55	10.99	3.14	46.15
MASRAF AL RAYA	2.245	0.13	0.13	-3.65	-3.61	-15.44	0.86	14.60	4.45	20.89
MESAIEED PETRO	1.632	-0.06	-0.06	-2.45	-0.79	-8.72	1.27	20.34	5.27	20.52
Oman										
BANK MUSCAT	0.251	-0.40	-0.40	-0.40	0.00	-4.92	0.80	9.56	6.18	1.88
OMANTEL	1.000	0.00	0.00	0.00	-1.48	-5.66	1.22	11.29	6.00	0.75
BANK DHOFAR	0.154	0.00	0.00	0.00	-6.67	-3.75	0.64	14.54	5.03	0.46
NAT BANK OF OMAN	0.270	1.89	1.89	1.89	6.72	-3.57	0.64	9.37	3.15	0.44
OMINVEST	0.335	0.00	0.00	-1.47	-5.63	-15.25	0.71	7.28	5.97	0.22

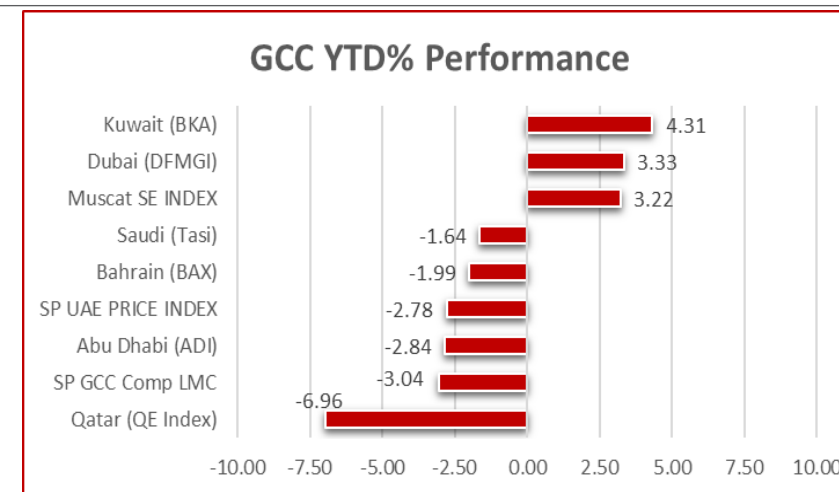
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Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
31-July-24	24.42%	14.01%	0.06%	2.85%	6.89%	17.59%	12.97%	6.0%	5.66%
07-August 24	24.49%	14.32%	0.06%	3.00%	7.20%	17.59%	12.99%	6.0%	5.66%

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 + 0.64 %The leading sector best performance indices today are Consumer Disc 1.52 % Financial services 0.99 % Real estate 0.79 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.72 %, SABIC have positive performance today by + 0.13 %, STC have negative performance today by -0.13 %, Al Rajhi Bank has a positive performance today by + 0.23 %.



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