

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 11th September 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,766.4	-1.84	-2.75	-3.12	0.74	-1.68	2.96	22.52	3.47	9,887.80
Qatar (QE Index)	10,248.1	-0.18	-0.73	0.44	2.81	-5.38	1.19	11.56	4.38	517.41
Dubai (DFMGI)	4,346.4	-0.94	-0.60	0.48	7.85	7.06	1.53	8.51	5.53	655.22
Abu Dhabi (ADI)	9,322.7	-0.85	-1.33	0.41	2.89	-2.66	2.69		2.08	2,569.66
Bahrain (BAX)	1,954.0	0.26	0.38	-0.18	-3.53	-0.89	0.87	9.98	4.75	7.55
Muscat SE INDEX	4,724.8	-0.50	-0.76	-0.46	0.80	4.67	0.84	10.03	5.79	7.35
SP GCC Comp LMC	179.5	-1.58	-2.28	-2.08	2.56	-2.96	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.1	-1.58	-1.74	-0.47	7.40	-0.52				
Developed Markets										
MSCI World Index	3,578.7	0.75	1.71	-2.26	1.90	12.92				
U.S. (S&P 500)	5,554.1	1.07	2.69	-1.67	1.72	16.44	4.56	26.17	1.61	48,666.62
U.K. (FTSE 100)	8,193.9	-0.15	0.15	-2.18	0.37	5.96	1.74	14.95	3.73	2,130.39
Japan (topix)	2,530.7	-1.78	-2.57	-6.71	-9.93	6.94	1.32	13.78	2.29	894,089.99
Emerging Markets										
MSCI EM Index	1,058.7	-0.39	-1.51	-3.75	-2.54	3.41				
China (SSE Composite)	2,721.8	-0.82	-1.59	-4.24	-8.28	-8.51	1.36	12.00		44,025.04
India (Sensex)	81,523.2	-0.49	0.42	-1.02	3.15	12.85	4.35	23.66	1.12	162,556.34
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,147.0	-0.66	-0.55	-0.47	3.03	4.84	1.47	15.47	3.69	43.30
Kuwait Premier Index	7,740.0	-0.95	-1.01	-1.05	2.60	3.52	1.59	16.72	3.47	35.72
Kuwait Main Index	6,212.1	0.73	1.67	2.33	5.07	11.53	1.09	11.06	4.84	7.58
Kuwait Sector										
Banking	1,755.8	-1.01	-0.74	-1.29	2.56	6.58	1.76	17.55	3.09	26.55
Telecom	1,002.0	-0.99	-2.49	-1.15	1.86	-9.33	1.48	12.21	8.31	3.09
Industrials	754.5	-0.92	-1.66	-0.84	-2.35	-16.90	0.81	11.83	5.67	2.58
Financial Services	1,442.2	-0.04	1.26	3.13	9.99	18.98	1.18	12.93	2.86	4.82
Real Estate	1,332.6	-0.10	-0.66	-0.82	2.86	9.87	1.02	14.42	2.12	2.82
Basic Materials	812.8	0.42	0.28	-0.49	7.58	8.96	1.46	13.98	10.82	0.46
Health Care	471.8	6.89	-0.27	6.89	6.84	-2.14	1.48	16.70	2.37	
Consumer Staples	991.5	2.15	-1.80	-0.03	20.27	50.55	2.11	20.02	2.12	0.29
Insurance	2,054.3	-0.07	2.83	4.72	-18.47	-10.40	1.12	11.20	3.86	0.83
Consumer Discretionary	1,813.7	1.96	1.82	2.27	17.78	13.08				
Energy	1,098.4	-0.34	1.04	-0.06	6.62	15.75	0.94	9.46	5.75	0.22
Technology	1,571.4	-1.82	-5.68	-1.82	-0.92	171.70	1.86	666.67		0.02
Utilities	397.4	-1.31	-0.66	-1.31	-5.62	-12.72				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were flat on Thursday as concerns about lower demand erased the gains from the previous session spurred by Hurricane's Francine's impact on output in the U.S., the world's biggest crude producer. Brent crude futures for November were up 24 cents, or 0.34% at \$70.86 a barrel.

Kuwait Market

The market closed down by -0.66% at 7,147.0 value traded 83.0 million KD, Premier market value reached 45.0 million KD down by -0.95% at 7,740.0.

KSA Market

The market closed down by -1.84% at 11,766.4.

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	0.867	-1.59	-0.80	-1.25	1.29	1.83	1.66	12.99	3.90	7.22
KFH	0.717	-0.97	-0.97	-1.38	1.70	7.65	2.07	20.01	2.67	12.27
ZAIN	0.460	-1.08	-3.16	-1.50	3.14	-9.27	1.73	10.75	7.61	1.99
BOUBYAN BANK	0.580	-0.51	-1.36	-1.36	2.84	2.47	2.39	29.47	1.30	2.44
AGILITY	0.244	-1.61	-4.69	-4.69	-12.54	-13.85	0.71	7.89	8.20	0.65
Saudi Arabia										
ARAMCO	27.00	-0.74	-2.00	-3.40	-3.23	-18.18	4.33	14.98	7.04	6,535.22
SABIC	72.30	-2.03	-2.03	-3.34	-2.03	-13.41	1.32	112.80	4.56	216.94
STC	42.35	-0.70	-0.70	-1.51	11.15	7.63	2.76	15.38	3.78	211.79
AL-RAJHI BANK	87.00	-1.36	-1.92	-1.25	8.75	0.58	2.99	20.98	2.76	348.06
NCB	34.15	-1.44	-3.53	-2.43	-5.79	-11.64	1.13	10.44	5.27	204.94
Abu Dhabi										
ETISALAT.AD	17.74	-2.53	-3.17	-2.21	10.19	-9.67	3.52	13.91	4.59	154.28
FAB.AD	13.46	-1.32	1.20	0.45	8.03	-3.58	1.21	9.33	5.27	148.70
EMIRATES NBD	19.80	-2.70	-2.46	0.51	20.00	14.45	1.08	5.56	6.06	125.07
DB ISLAMIC DB	6.11	-1.77	-0.49	-0.97	6.45	6.82	1.00	6.70	7.36	44.24
EMAR.DU	8.46	-1.51	-2.87	0.24	3.17	6.82	0.97	6.22	5.91	74.78
Qatar										
QNB	15.700	-0.38	-1.38	-0.88	7.17	-5.02	1.33	9.72	4.17	145.05
INDUSTREIS QAT	12.970	0.31	-0.46	0.54	0.70	-0.84	2.09	15.05	5.40	78.49
QA ISLAMIC BK	19.920	0.20	-0.40	1.94	7.10	-7.35	1.58	11.22	3.07	47.08
MASRAF AL RAYA	2.367	0.13	-0.08	2.91	1.63	-10.85	0.90	15.39	4.22	22.02
MESAIEED PETRO	1.619	-1.28	-2.70	-1.88	-1.58	-9.45	1.24	22.70	4.32	20.35
Oman										
BANK MUSCAT	0.259	-0.38	-0.38	0.39	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	1.001	-0.30	-0.50	-0.79	-1.38	-5.57	1.21	11.71	5.99	0.75
BANK DHOFAR	0.158	0.00	0.00	0.00	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.280	0.36	3.70	3.70	10.67	0.00	0.66	9.72	3.04	0.46
OMINVEST	0.363	-0.55	3.71	10.00	2.25	-8.17	0.80	8.75	5.51	0.24

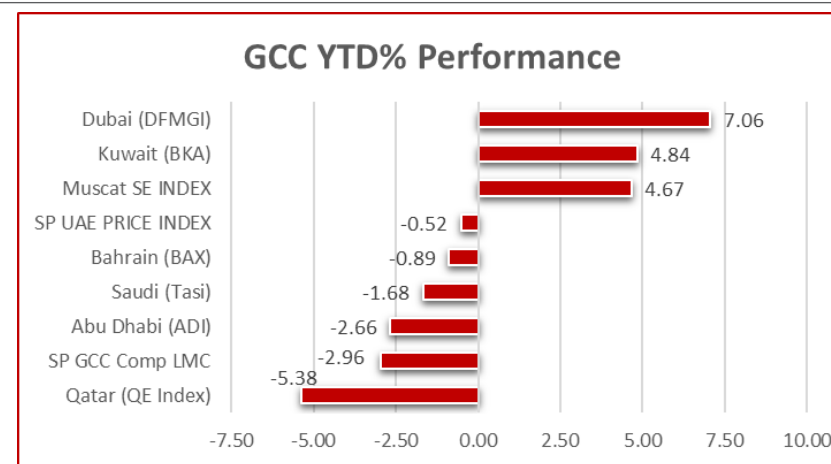
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%
04-Sept. 24	24.65%	15.09%	0.06%	3.53%	7.78%	17.58%	12.96%	5.96%	5.62%

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 -0.66 % The leading sector bottom performance indices today are Technology -1.82 % Utilities -1.31 % Banking -1.01 % respectively.

KSA

Saudi Armco have negative performance today by -0.74 %, SABIC have negative performance today by -2.0%, STC have negative performance today by -0.7 %, Al Rajhi Bank have negative performance today by -1.36 %.



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