

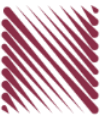


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday ,12<sup>th</sup> August 2024





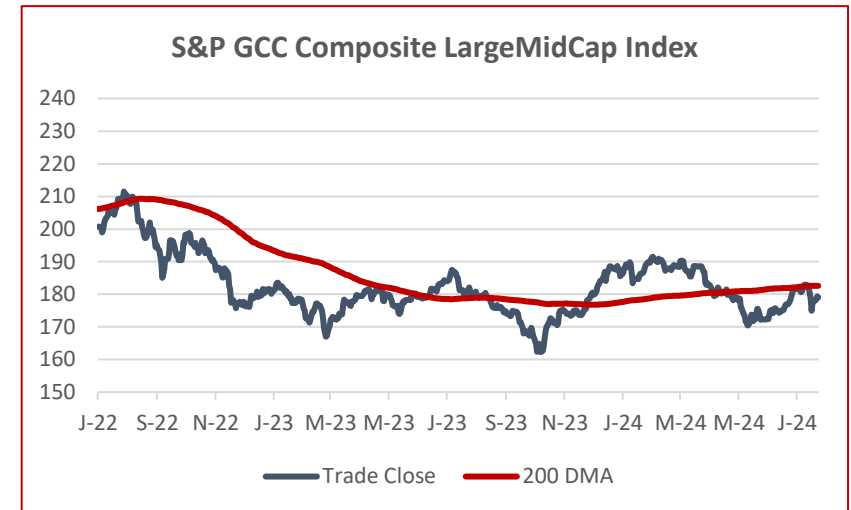
Monday, August 12, 2024

| * Market Watch           | Close Price | DTD   | WTD   | MTD    | QTD    | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|--------|--------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |        |        |       |      |       |                |                       |
| Saudi (Tasi)             | 11,740.7    | -0.26 | 0.63  | -3.05  | 0.52   | -1.89 | 2.90 | 22.12 | 3.34           | 10,081.35             |
| Qatar (QE Index)         | 10,093.5    | 0.16  | 0.40  | -0.60  | 1.26   | -6.81 | 1.17 | 11.37 | 4.59           | 510.28                |
| Dubai (DFMGI)            | 4,201.3     | 0.15  | 0.15  | -1.56  | 4.25   | 3.48  | 1.47 | 8.45  | 5.75           | 635.36                |
| Abu Dhabi (ADI)          | 9,214.9     | -0.97 | -0.97 | -1.33  | 1.70   | -3.79 | 2.66 | 16.78 | 2.10           | 2,550.24              |
| Bahrain (BAX)            | 1,935.8     | 0.19  | 1.31  | -1.73  | -4.43  | -1.81 | 0.86 | 10.94 | 4.66           | 7.48                  |
| Muscat SE INDEX          | 4,686.2     | 0.57  | 0.89  | 0.53   | -0.02  | 3.81  | 0.83 | 9.88  | 5.85           | 7.26                  |
| SP GCC Comp LMC          | 179.0       | -0.16 | 0.53  | -2.13  | 2.31   | -3.19 | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 134.3       | 0.24  | 0.24  | -0.86  | 5.21   | -2.55 |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |        |        |       |      |       |                |                       |
| MSCI World Index         | 3,446.3     | -0.04 | -0.04 | -3.51  | -1.86  | 8.75  |      |       |                |                       |
| U.S. (S&P 500)           | 5,344.4     | 0.00  | 0.00  | -3.22  | -2.13  | 12.05 | 4.41 | 25.48 | 1.64           | 47,300.01             |
| U.K. (FTSE 100)          | 8,210.3     | 0.52  | 0.52  | -1.88  | 0.57   | 6.17  | 1.73 | 14.85 | 3.74           | 2,136.29              |
| Japan (topix)            | 2,483.3     | 0.88  | -2.14 | -11.13 | -11.61 | 4.94  | 1.30 | 13.55 | 2.34           | 874,627.95            |
| <b>Emerging Markets</b>  |             |       |       |        |        |       |      |       |                |                       |
| MSCI EM Index            | 1,069.1     | 0.53  | 0.53  | -1.44  | -1.58  | 4.43  |      |       |                |                       |
| China (SSE Composite)    | 2,858.2     | -0.14 | -0.14 | -2.74  | -3.68  | -3.92 | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 79,648.9    | -0.07 | -0.07 | -2.56  | 0.78   | 10.26 | 4.39 | 23.24 | 1.15           | 157,730.77            |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|--------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |        |        |      |        |                |                       |
| Kuwait All Share Index | 7,052.8     | -0.82 | -0.18 | -2.58 | 1.67   | 3.45   | 1.46 | 15.18  | 3.65           | 42.81                 |
| Kuwait Premier Index   | 7,684.7     | -0.82 | -0.16 | -2.72 | 1.87   | 2.78   | 1.58 | 16.58  | 3.47           | 35.42                 |
| Kuwait Main Index      | 5,954.0     | -0.83 | -0.28 | -1.89 | 0.70   | 6.90   | 1.06 | 10.42  | 4.51           | 7.38                  |
| <b>Kuwait Sector</b>   |             |       |       |       |        |        |      |        |                |                       |
| Banking                | 1,752.2     | -0.87 | -0.13 | -2.89 | 2.34   | 6.36   | 1.75 | 17.49  | 3.07           | 26.46                 |
| Telecom                | 975.1       | -0.53 | -0.77 | -1.74 | -0.87  | -11.77 | 1.44 | 11.83  | 8.57           | 3.00                  |
| Industrials            | 760.8       | -0.35 | -0.22 | -3.08 | -1.53  | -16.20 | 0.81 | 11.39  | 5.66           | 2.58                  |
| Financial Services     | 1,342.2     | -0.54 | 0.45  | -1.63 | 2.36   | 10.72  | 1.11 | 11.64  | 2.93           | 4.52                  |
| Real Estate            | 1,319.8     | 0.04  | 0.83  | -1.02 | 1.87   | 8.81   | 1.01 | 14.52  | 2.07           | 2.79                  |
| Basic Materials        | 750.0       | -0.24 | 0.43  | 0.00  | -0.72  | 0.55   | 1.35 | 13.19  | 11.65          | 0.42                  |
| Health Care            | 468.0       | 0.00  | 0.00  | 0.00  | 5.97   | -2.93  | 1.56 | 14.30  | 2.24           |                       |
| Consumer Staples       | 1,015.5     | -0.97 | -0.67 | 3.34  | 23.18  | 54.19  | 2.23 | 21.11  | 2.00           | 0.31                  |
| Insurance              | 2,155.9     | -6.29 | -6.96 | -9.18 | -14.44 | -5.97  | 1.25 | 11.26  | 3.45           | 0.93                  |
| Consumer Discretionary | 1,669.1     | -0.98 | 0.53  | -1.45 | 8.38   | 4.06   |      |        |                |                       |
| Energy                 | 1,055.7     | 0.53  | 0.68  | -1.62 | 2.47   | 11.24  | 0.90 | 9.66   | 6.32           | 0.21                  |
| Technology             | 1,651.4     | 6.57  | 6.57  | 1.34  | 4.13   | 185.53 | 1.80 | 256.63 |                | 0.02                  |
| Utilities              | 407.9       | -0.64 | 0.00  | -3.73 | -3.13  | -10.41 |      |        |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

Oil prices edged lower on Tuesday, breaking a five-day streak of gains, as markets refocused on concerns about demand after OPEC on Monday cut its forecast for demand growth in 2024 due to softer expectations in China. Global benchmark Brent crude futures dipped 41 cents, or 0.5%, lower to \$81.89 a barrel at 0005 GMT.

#### Kuwait Market

The market closed down by -0.82% at 7,052.8 value traded 42.4 million KD, Premier market value reached 33.5 million KD down by -0.82% at 7,684.7.

#### KSA Market

The market closed down by -0.26% at 11,740.7

# 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) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |        |      |        |                |                       |
| NBK                    | 0.867       | -0.80 | -0.23 | -4.20 | 1.29  | 1.83   | 1.66 | 12.99  | 3.90           | 7.24                  |
| KFH                    | 0.716       | -1.38 | -0.56 | -2.85 | 1.56  | 7.50   | 2.07 | 19.98  | 2.68           | 12.29                 |
| ZAIN                   | 0.447       | -0.89 | -1.32 | -1.76 | 0.22  | -11.83 | 1.68 | 10.44  | 7.83           | 1.94                  |
| BOUBYAN BANK           | 0.583       | -0.51 | -0.17 | -1.52 | 3.37  | 3.00   | 2.40 | 29.62  | 1.29           | 2.46                  |
| AGILITY                | 0.261       | -0.76 | -1.51 | -4.74 | -6.45 | -7.84  | 0.70 | 7.66   | 7.66           | 0.70                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |        |      |        |                |                       |
| ARAMCO                 | 27.95       | 0.00  | 0.72  | 1.27  | 0.18  | -15.30 | 4.48 | 15.51  | 6.80           | 6,757.41              |
| SABIC                  | 75.40       | 0.40  | 0.53  | -4.31 | 2.17  | -9.70  | 1.38 | 117.64 | 4.38           | 225.98                |
| STC                    | 38.90       | 2.37  | 2.23  | 1.04  | 2.10  | -1.13  | 2.54 | 14.13  | 4.11           | 194.31                |
| AL-RAJHI BANK          | 85.50       | -0.58 | -0.35 | -0.12 | 6.88  | -1.16  | 2.94 | 20.62  | 2.81           | 341.67                |
| NCB                    | 34.90       | -1.69 | 0.58  | -8.16 | -3.72 | -9.70  | 1.16 | 10.67  | 5.16           | 209.20                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |        |      |        |                |                       |
| ETISALAT.AD            | 16.90       | -1.05 | -1.05 | 3.17  | 4.97  | -13.95 | 3.35 | 13.25  | 4.82           | 146.95                |
| FAB.AD                 | 13.42       | 0.00  | 0.00  | 2.91  | 7.70  | -3.87  | 1.20 | 9.30   | 5.29           | 148.23                |
| EMIRATES NBD           | 19.25       | -0.52 | -0.52 | 0.79  | 16.67 | 11.27  | 1.05 | 5.40   | 6.23           | 121.57                |
| DB ISLAMIC DB          | 5.88        | 0.86  | 0.86  | 0.51  | 2.44  | 2.80   | 0.96 | 6.44   | 7.65           | 42.57                 |
| EMAR.DU                | 8.20        | 0.61  | 0.61  | -4.98 | 0.00  | 3.54   | 0.91 | 6.39   | 6.10           | 72.47                 |
| <b>Qatar</b>           |             |       |       |       |       |        |      |        |                |                       |
| QNB                    | 15.470      | 0.85  | 1.11  | 1.18  | 5.60  | -6.41  | 1.31 | 9.58   | 4.23           | 142.87                |
| INDUSTREIS QAT         | 13.100      | 0.85  | 1.00  | 0.08  | 1.71  | 0.15   | 2.17 | 16.39  | 5.95           | 79.24                 |
| QA ISLAMIC BK          | 19.450      | -0.36 | -0.51 | -1.27 | 4.57  | -9.53  | 1.55 | 10.95  | 3.15           | 45.95                 |
| MASRAF AL RAYA         | 2.250       | 0.22  | 0.36  | -3.43 | -3.39 | -15.25 | 0.86 | 14.63  | 4.44           | 20.92                 |
| MESAIEED PETRO         | 1.625       | -0.43 | -0.49 | -2.87 | -1.22 | -9.12  | 1.26 | 20.25  | 5.29           | 20.41                 |
| <b>Oman</b>            |             |       |       |       |       |        |      |        |                |                       |
| BANK MUSCAT            | 0.25        | -0.40 | -0.79 | -0.79 | -0.40 | -5.30  | 0.80 | 9.52   | 6.20           | 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            | 0.160       | 3.90  | 3.90  | 3.90  | -3.03 | 0.00   | 0.66 | 15.11  | 4.84           | 0.48                  |
| NAT BANK OF OMAN       | 0.270       | 0.00  | 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                  |

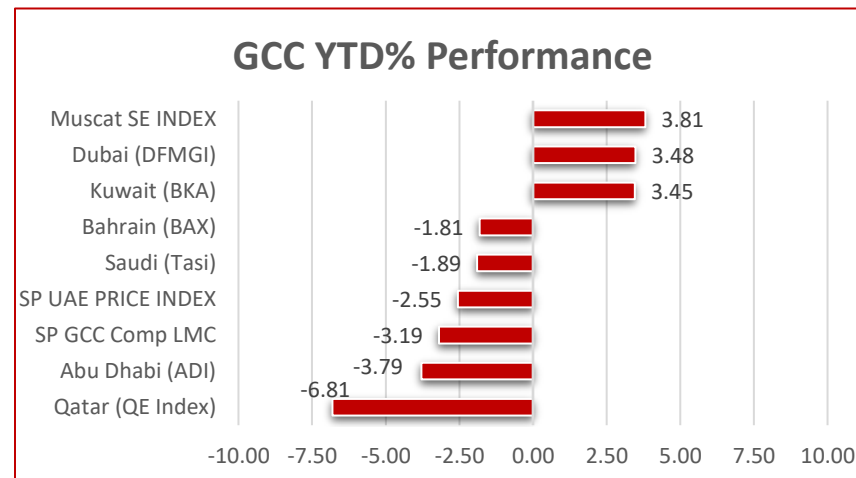
\* GCC Markets performance at the latest close.

| 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 down today by -0.82 %The leading sector bottom performance indices today are Insurance -6.29 % Consumer Disc -0.98 % Consumer services -0.97 % respectively.

#### KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.39%. STC has a positive performance today by + 2.37 %, Al Rajhi Bank have negative performance today by -0.58 %



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)