



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 12th September 2024



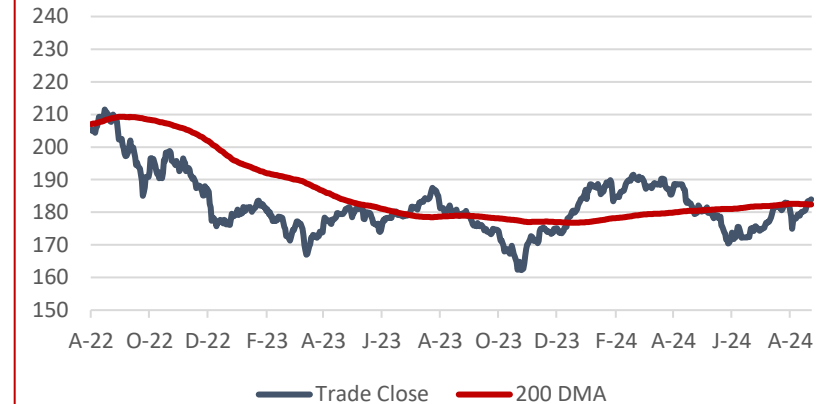


Thursday, September 12, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,900.3	0.49	0.49	-2.02	1.89	-0.56	3.00	22.85	3.43	9,969.78
Qatar (QE Index)	10,459.1	0.58	0.58	2.51	4.93	-3.43	1.22	11.82	4.28	529.53
Dubai (DFMGI)	4,380.5	0.36	0.17	1.27	8.70	7.90	1.54	8.58	5.48	660.65
Abu Dhabi (ADI)	9,350.3	0.46	-1.03	0.70	3.20	-2.38	2.70	16.92	2.07	2,578.31
Bahrain (BAX)	1,952.4	-0.08	0.30	-0.26	-3.61	-0.97	0.87	9.95	4.76	7.55
Muscat SE INDEX	4,745.6	0.44	-0.32	-0.02	1.24	5.13	0.84	10.08	5.75	7.39
SP GCC Comp LMC	181.7	0.36	0.36	-0.89	3.80	-1.78	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.4	0.00	0.00	0.49	8.44	0.44				
Developed Markets										
MSCI World Index	3,634.9	0.65	3.30	-0.72	3.50	14.69				
U.S. (S&P 500)	5,626.0	0.54	4.02	-0.40	3.03	17.95	4.66	26.78	1.57	49,846.88
U.K. (FTSE 100)	8,273.1	0.39	1.12	-1.24	1.33	6.98	1.76	15.08	3.70	2,151.52
Japan (topix)	2,571.1	-0.82	-1.01	-5.22	-8.49	8.65	1.34	13.99	2.26	908,194.23
Emerging Markets										
MSCI EM Index	1,082.3	0.62	0.69	-1.60	-0.36	5.72				
China (SSE Composite)	2,704.1	-0.48	-2.23	-4.86	-8.87	-9.10	1.36	12.00		44,025.04
India (Sensex)	82,890.9	-0.09	2.10	0.64	4.88	14.74	4.43	24.05	1.10	165,297.62
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,158.6	0.16	-0.39	-0.31	3.19	5.01	1.47	15.39	3.71	43.09
Kuwait Premier Index	7,748.4	0.11	-0.90	-0.94	2.71	3.63	1.58	16.58	3.50	35.42
Kuwait Main Index	6,237.4	0.41	2.09	2.75	5.50	11.99	1.10	11.20	4.80	7.66
Kuwait Sector										
Banking	1,758.2	0.14	-0.61	-1.15	2.70	6.72	1.75	17.40	3.11	26.32
Telecom	1,001.6	-0.04	-2.53	-1.19	1.82	-9.37	1.47	12.09	8.39	3.06
Industrials	754.6	0.01	-1.65	-0.82	-2.34	-16.89	0.80	11.73	5.72	2.55
Financial Services	1,444.2	0.14	1.39	3.27	10.14	19.14	1.18	12.95	2.86	4.83
Real Estate	1,339.0	0.48	-0.19	-0.35	3.35	10.39	1.03	14.48	2.11	2.83
Basic Materials	806.6	-0.76	-0.48	-1.25	6.76	8.13	1.45	13.94	10.86	0.46
Health Care	471.8	0.00	-0.27	6.89	6.84	-2.14	1.58	17.85	2.22	
Consumer Staples	990.5	-0.10	-1.90	-0.14	20.15	50.40	2.15	20.42	2.07	0.30
Insurance	2,097.8	2.12	5.00	6.94	-16.75	-8.51	1.14	11.43	3.78	0.85
Consumer Discretionary	1,809.8	-0.22	1.60	2.05	17.52	12.84				
Energy	1,120.6	2.02	3.08	1.96	8.78	18.09	0.96	9.60	5.65	0.23
Technology	1,505.9	-4.17	-9.61	-5.91	-5.05	160.38	1.75	627.27		0.02
Utilities	397.4	0.00	-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 edged up in early trade on Monday amid expectations of a U.S. interest rate cut this week, though gains were capped by U.S. supply resumptions following Hurricane Francine and weaker China data. Brent crude futures for November were up 15 cents, or 0.2% at \$71.76 a barrel.

Kuwait Market

The market closed up by +0.16% at 7,158.6 value traded 51.8 million KD, Premier market value reached 25.6 million KD up by +0.11% at 7,748.4.

KSA Market

The market closed up by +0.49% at 11,900.3.

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	0.868	0.12	-0.69	-1.14	1.40	1.95	1.66	13.01	3.90	7.23
KFH	0.720	0.42	-0.55	-0.96	2.13	8.10	2.08	20.09	2.66	12.32
ZAIN	0.459	-0.22	-3.37	-1.71	2.91	-9.47	1.73	10.72	7.63	1.99
BOUBYAN BANK	0.576	-0.69	-2.04	-2.04	2.13	1.76	2.38	29.27	1.31	2.42
AGILITY	0.247	1.23	-3.52	-3.52	-11.47	-12.79	0.72	7.99	8.10	0.66
Saudi Arabia										
ARAMCO	27.20	0.37	0.37	-2.68	-2.51	-17.58	4.36	15.10	6.98	6,582.40
SABIC	72.40	-0.28	-0.28	-3.21	-1.90	-13.29	1.33	112.96	4.56	217.20
STC	42.30	0.00	0.00	-1.63	11.02	7.51	2.76	15.36	3.78	211.50
AL-RAJHI BANK	88.90	1.14	1.14	0.91	11.13	2.77	3.06	21.44	2.70	355.60
NCB	34.30	0.29	0.29	-2.00	-5.38	-11.25	1.14	10.49	5.25	205.80
Abu Dhabi										
ETISALAT.AD	17.98	1.47	-1.86	-0.88	11.68	-8.45	3.57	14.10	4.53	156.37
FAB.AD	13.58	1.80	2.11	1.34	8.99	-2.72	1.22	9.41	5.23	150.03
EMIRATES NBD	20.00	1.78	-1.48	1.52	21.21	15.61	1.09	5.61	6.00	126.33
DB ISLAMIC DB	6.14	0.16	0.00	-0.49	6.97	7.34	1.00	6.73	7.33	44.46
EMAR.DU	8.61	0.70	-1.15	2.01	5.00	8.71	0.98	6.33	5.81	76.10
Qatar										
QNB	16.400	-0.36	-0.36	3.54	11.95	-0.79	1.39	10.15	3.99	151.48
INDUSTREIS QAT	13.050	0.31	0.31	1.16	1.32	-0.23	2.10	15.15	5.36	78.95
QA ISLAMIC BK	20.510	0.79	0.79	4.96	10.27	-4.60	1.63	11.55	2.99	48.46
MASRAF AL RAYA	2.450	2.04	2.04	6.52	5.20	-7.72	0.93	15.93	4.08	22.79
MESAEED PETRO	1.641	0.24	0.24	-0.55	-0.24	-8.22	1.26	23.01	4.27	20.62
Oman										
BANK MUSCAT	0.26	0.39	0.00	0.78	3.59	-1.52	0.83	9.90	5.96	1.95
OMANTEL	1.006	0.50	0.00	-0.30	-0.89	-5.09	1.22	11.77	5.96	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	0.283	1.07	4.81	4.81	11.86	1.07	0.67	9.82	3.00	0.46
OMINVEST	0.363	0.00	3.71	10.00	2.25	-8.17	0.80	8.75	5.51	0.24

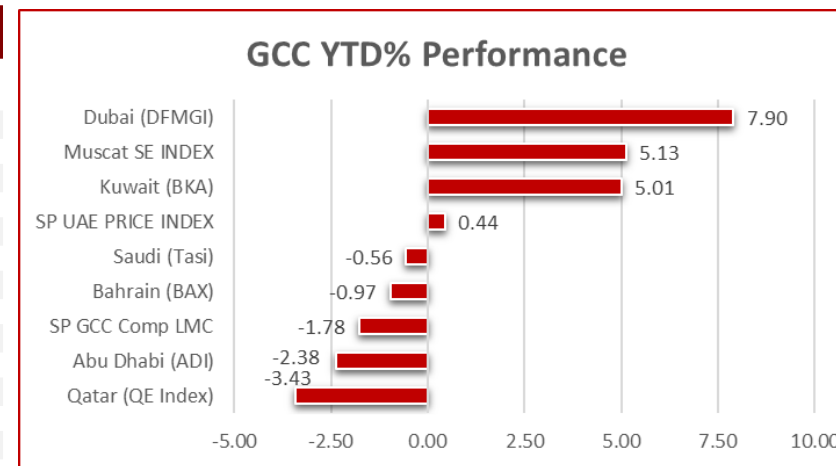
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
04-Sept. 24	24.65%	15.09%	0.06%	3.53%	7.78%	17.58%	12.96%	5.96%	5.62%
11-Sept. 24	24.62%	15.30%	0.06%	3.64%	7.83%	17.57%	12.97%	5.94%	5.64%

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 + 0.16 %The leading sector best performance indices today are Insurance 2.12 % Energy 2.02 % Real estate 0.48 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.37 %, SABIC have Negative performance today by – 0.28%, STC have stable performance today, Al Rajhi Bank has a positive performance today by + 1.14 %.



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