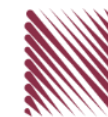


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday ,13th August 2024





Tuesday, August 13, 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)	11,796.8	0.48	1.11	-2.58	1.00	-1.43	2.90	22.08	3.33	10,157.13
Qatar (QE Index)	10,071.4	-0.22	0.18	-0.81	1.04	-7.01	1.17	11.35	4.60	509.69
Dubai (DFMGI)	4,184.5	-0.40	-0.25	-1.96	3.83	3.07	1.46	8.32	5.77	633.02
Abu Dhabi (ADI)	9,175.1	-0.43	-1.40	-1.75	1.26	-4.20	2.65	16.70	2.11	2,543.36
Bahrain (BAX)	1,934.1	-0.08	1.22	-1.81	-4.51	-1.89	0.86	10.75	4.67	7.47
Muscat SE INDEX	4,660.0	-0.56	0.33	-0.03	-0.58	3.23	0.83	9.84	5.87	7.23
SP GCC Comp LMC	179.0	-0.03	0.51	-2.16	2.28	-3.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.1	-0.17	0.07	-1.03	5.03	-2.71				
Developed Markets										
MSCI World Index	3,501.9	1.61	1.57	-1.95	-0.28	10.50				
U.S. (S&P 500)	5,434.4	1.68	1.69	-1.59	-0.48	13.93	4.42	25.48	1.64	47,296.87
U.K. (FTSE 100)	8,235.2	0.30	0.82	-1.59	0.87	6.49	1.74	14.90	3.73	2,142.51
Japan (topix)	2,553.6	2.83	2.83	-8.61	-9.11	7.91	1.33	13.93	2.27	898,501.54
Emerging Markets										
MSCI EM Index	1,071.0	0.18	0.71	-1.27	-1.40	4.62				
China (SSE Composite)	2,867.9	0.34	0.20	-2.41	-3.35	-3.60	1.36	12.00		44,025.04
India (Sensex)	78,956.0	-0.87	-0.94	-3.41	-0.10	9.30	4.34	23.04	1.16	156,645.74
Kuwait										
Kuwait All Share Index	7,009.6	-0.61	-0.79	-3.17	1.05	2.82	1.45	15.05	3.68	42.46
Kuwait Premier Index	7,620.0	-0.84	-1.00	-3.54	1.01	1.91	1.57	16.44	3.50	35.13
Kuwait Main Index	5,983.8	0.50	0.22	-1.40	1.21	7.44	1.05	10.33	4.55	7.32
Kuwait Sector										
Banking	1,735.7	-0.94	-1.07	-3.80	1.38	5.36	1.74	17.34	3.10	26.23
Telecom	968.4	-0.69	-1.45	-2.41	-1.55	-12.37	1.43	11.77	8.62	2.98
Industrials	757.6	-0.42	-0.64	-3.48	-1.94	-16.55	0.81	11.35	5.68	2.57
Financial Services	1,334.6	-0.57	-0.12	-2.19	1.78	10.10	1.10	11.57	2.94	4.49
Real Estate	1,319.1	-0.05	0.78	-1.07	1.81	8.75	1.01	14.55	2.07	2.79
Basic Materials	749.3	-0.10	0.33	-0.09	-0.82	0.45	1.35	13.16	11.68	0.42
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	984.3	-3.07	-3.72	0.17	19.40	49.46	2.20	20.91	2.02	0.31
Insurance	2,302.6	6.80	-0.63	-3.00	-8.62	0.43	1.18	10.54	3.68	0.87
Consumer Discretionary	1,663.7	-0.32	0.21	-1.77	8.03	3.73				
Energy	1,059.7	0.39	1.07	-1.24	2.86	11.67	0.90	9.68	6.29	0.21
Technology	1,651.4	0.00	6.57	1.34	4.13	185.53	1.92	273.49		0.02
Utilities	402.6	-1.29	-1.29	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices climbed on Wednesday on estimates about shrinking U.S. crude and gasoline inventories as the market watched for a possible widening of the Middle Eastern war, which could curtail global oil supplies. Brent crude futures rose 30 cents to \$80.99 a barrel.

Kuwait Market

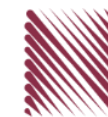
The market closed down by -0.61% at 7,009.6 value traded 49.1 million KD, Premier market value reached 36.1 million KD down by -0.84% at 7,620.0.

KSA Market

The market closed up by +0.48% at 11,796.8.

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	0.861	-0.69	-0.92	-4.86	0.58	1.12	1.64	12.90	3.93	7.19
KFH	0.709	-0.98	-1.53	-3.80	0.57	6.45	2.05	19.79	2.70	12.16
ZAIN	0.444	-0.67	-1.99	-2.42	-0.45	-12.43	1.67	10.37	7.88	1.93
BOUBYAN BANK	0.579	-0.69	-0.86	-2.20	2.66	2.29	2.39	29.42	1.30	2.44
AGILITY	0.261	0.00	-1.51	-4.74	-6.45	-7.84	0.70	7.66	7.66	0.70
Saudi Arabia										
ARAMCO	28.20	0.89	1.62	2.17	1.08	-14.55	4.52	15.65	6.74	6,818.40
SABIC	75.30	-0.13	0.40	-4.44	2.03	-9.82	1.38	117.49	4.38	225.70
STC	39.10	0.51	2.76	1.56	2.62	-0.63	2.55	14.20	4.09	195.33
AL-RAJHI BANK	84.50	-1.17	-1.52	-1.29	5.62	-2.31	2.90	20.37	2.84	337.70
NCB	34.85	-0.14	0.43	-8.29	-3.86	-9.83	1.16	10.66	5.16	208.92
Abu Dhabi										
ETISALAT.AD	16.90	0.00	-1.05	3.17	4.97	-13.95	3.35	13.25	4.82	146.97
FAB.AD	13.48	0.45	0.45	3.37	8.19	-3.44	1.21	9.34	5.27	148.91
EMIRATES NBD	19.15	-0.52	-1.03	0.26	16.06	10.69	1.04	5.37	6.27	120.96
DB ISLAMIC DB	5.78	-1.70	-0.86	-1.20	0.70	1.05	0.94	6.34	7.79	41.85
EMAR.DU	8.26	0.73	1.35	-4.29	0.73	4.29	0.94	6.07	6.05	73.00
Qatar										
QNB	15.590	0.78	1.90	1.96	6.42	-5.69	1.32	9.65	4.20	143.98
INDUSTREIS QAT	12.990	-0.84	0.15	-0.76	0.85	-0.69	2.09	15.08	6.00	78.58
QA ISLAMIC BK	19.600	0.77	0.26	-0.51	5.38	-8.84	1.56	11.04	3.13	46.31
MASRAF AL RAYA	2.225	-1.11	-0.76	-4.51	-4.47	-16.20	0.85	14.47	4.49	20.69
MESAIEED PETRO	1.600	-1.54	-2.02	-4.36	-2.74	-10.51	1.23	22.43	5.38	20.10
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	0.160	0.00	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

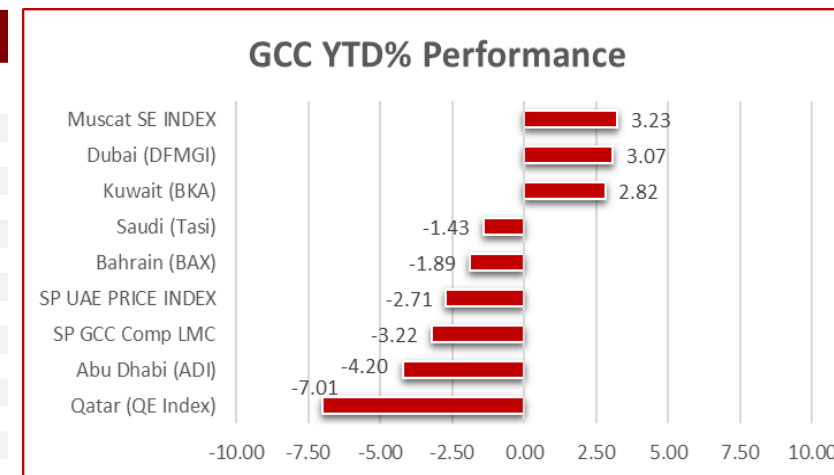
* GCC Markets performance at the latest close.

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 -0.61 %The leading sector bottom performance indices today are Consumer services -3.07 % Utilities -1.29 % Banking -0.94 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.89 %, SABIC have negative performance today by -0.13%, STC has a positive performance today by + 0.51 %, Al Rajhi Bank have negative performance today by -1.17 %.



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