

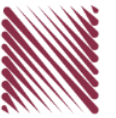


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 13th October 2024

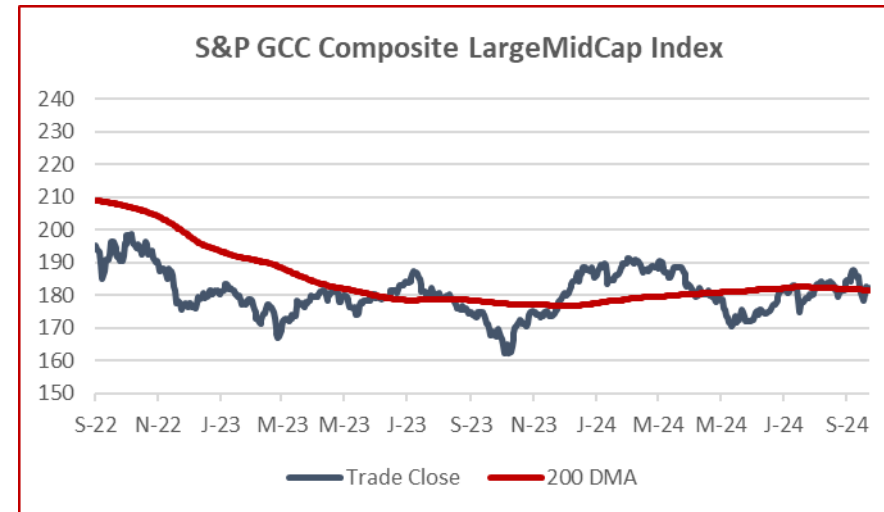




* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,994.2	0.56	0.31	-1.90	-1.90	0.22	2.92	22.18	3.43	10,044.77
Qatar (QE Index)	10,509.3	0.00	0.42	-0.99	-0.99	-2.97	1.23	11.87	4.26	532.81
Dubai (DFMGI)	4,440.7	0.07	0.79	-1.39	-1.39	9.38	1.56	8.72	5.39	672.30
Abu Dhabi (ADI)	9,260.9	0.11	0.88	-1.75	-1.75	-3.31	2.68	16.84	2.07	2,619.56
Bahrain (BAX)	1,998.9	-0.03	-0.37	-0.69	-0.69	1.39	0.91	10.40	4.57	7.74
Muscat SE INDEX	4,751.0	0.17	1.65	0.86	0.86	5.25	0.84	10.08	5.75	7.39
SP GCC Comp LMC	182.2	-0.06	0.80	-1.84	-1.84	-1.49	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.2	-0.26	1.37	-2.66	-2.66	0.25				
Developed Markets										
MSCI World Index	3,731.9	0.57	0.91	0.24	0.24	17.76				
U.S. (S&P 500)	5,815.0	0.61	1.11	0.91	0.91	21.91	4.83	28.18	1.53	51,762.77
U.K. (FTSE 100)	8,253.7	0.19	-0.33	0.20	0.20	6.73	1.74	15.04	3.71	2,144.97
Japan (topix)	2,706.2	-0.24	0.45	2.28	2.28	14.36	1.41	14.72	2.15	952,852.57
Emerging Markets										
MSCI EM Index	1,159.6	0.76	-1.90	-1.19	-1.19	13.01				
China (SSE Composite)	3,217.7	-2.55	-3.56	-3.56	-3.56	8.16	1.36	12.00		44,025.04
India (Sensex)	81,381.4	-0.28	-0.38	-3.46	-3.46	12.65	4.35	23.59	1.12	161,629.31

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,048.2	0.03	0.17	-1.23	-1.23	3.39	1.44	15.13	4.00	42.44
Kuwait Premier Index	7,579.2	0.03	-0.05	-1.68	-1.68	1.37	1.55	16.19	3.84	34.65
Kuwait Main Index	6,328.8	0.06	1.19	0.83	0.83	13.63	1.11	11.42	4.76	7.79
Kuwait Sector										
Banking	1,726.3	0.16	0.23	-1.53	-1.53	4.78	1.71	17.08	3.17	25.86
Telecom	1,004.8	-0.04	-1.29	-2.26	-2.26	-9.08	1.47	12.13	8.37	3.07
Industrials	724.3	0.20	0.81	-0.17	-0.17	-20.22	0.77	11.25	9.76	2.45
Financial Services	1,394.6	-0.48	0.40	-1.14	-1.14	15.04	1.14	12.45	2.95	4.66
Real Estate	1,379.9	-0.35	0.46	0.31	0.31	13.77	1.06	15.10	2.06	2.93
Basic Materials	821.6	-0.89	2.83	1.77	1.77	10.14	1.48	12.47	10.66	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,007.9	0.44	0.10	0.41	0.41	53.05	2.19	20.78	2.04	0.31
Insurance	2,033.9	-0.02	-2.28	-2.39	-2.39	-11.29	1.11	11.08	3.90	0.82
Consumer Discretionary	1,826.0	0.34	1.50	1.09	1.09	13.85				
Energy	1,093.1	-0.79	-2.20	-2.19	-2.19	15.18	0.93	9.29	5.80	0.22
Technology	1,054.9	-5.23	-21.20	-27.14	-27.14	82.39	1.22	439.39		0.01
Utilities	389.5	1.37	-0.67	0.00	0.00	-14.45				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

U.S. crude oil on Friday posted its second weekly gain in a row as Israel prepares to retaliate against Iran. The U.S. benchmark and global benchmark Brent gained more than 1% this week. Oil prices have gained more than 10% through Friday's close since Iran hit Israel with ballistic missiles last week. Brent December contract: \$79.04 per barrel.

Kuwait Market

The market up by 0.03% at 7,048.2 value traded 64.5 million KD, Premier market value reached 23.4 million KD up by 0.03% at 7,579.2.

KSA Market

The market closed up by +0.56% at 11,994.2.

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	0.23	0.93	-1.81	-1.81	1.83	1.66	12.99	3.90	7.22
KFH	0.710	0.28	0.57	-0.84	-0.84	6.60	2.05	19.82	2.70	12.15
ZAIN	0.459	-0.22	-1.92	-3.37	-3.37	-9.47	1.73	10.72	7.63	1.99
BOUBYAN BANK	0.539	0.19	-4.26	-5.44	-5.44	-4.78	2.22	27.39	1.40	2.26
AGILITY	0.217	0.00	0.46	-0.91	-0.91	-23.38	0.63	7.02	9.22	0.58
Saudi Arabia										
ARAMCO	27.05	0.37	0.00	-0.18	-0.18	-18.03	4.34	15.01	7.02	6,546.10
SABIC	73.20	0.14	-1.21	-2.27	-2.27	-12.34	1.34	114.21	4.51	219.60
STC	42.15	0.24	-0.82	-3.55	-3.55	7.13	2.75	15.31	3.80	210.75
AL-RAJHI BANK	85.40	1.67	1.55	-2.06	-2.06	-1.27	2.93	20.59	2.81	341.60
NCB	34.95	0.00	4.33	1.90	1.90	-9.57	1.16	10.69	5.15	209.70
Abu Dhabi										
ETISALAT.AD	17.92	-0.11	2.17	-3.24	-3.24	-8.86	3.55	14.04	4.55	155.67
FAB.AD	13.12	-0.15	1.55	-4.66	-4.66	-6.16	1.17	9.08	5.42	144.72
EMIRATES NBD	19.65	-0.76	-1.50	-3.20	-3.20	13.58	1.07	5.51	6.11	124.12
DB ISLAMIC DB	6.11	-0.65	0.33	-3.02	-3.02	6.82	1.00	6.70	7.36	44.24
EMAR.DU	8.45	-0.12	3.17	-3.10	-3.10	6.69	0.97	6.21	5.92	74.69
Qatar										
QNB	17.290	-0.12	2.07	2.01	2.01	4.60	1.43	10.51	3.79	159.70
INDUSTREIS QAT	13.120	0.38	0.54	0.61	0.61	0.31	2.11	15.23	5.34	79.38
QA ISLAMIC BK	20.950	0.24	0.24	-1.87	-1.87	-2.56	1.67	11.80	2.92	49.50
MASRAF AL RAYA	2.367	-0.21	-1.37	-4.17	-4.17	-10.85	0.90	15.39	4.22	22.01
MESAIEED PETRO	1.638	-0.24	0.37	0.49	0.49	-8.39	1.25	22.96	4.27	20.58
Oman										
BANK MUSCAT	0.259	0.78	3.19	2.78	2.78	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.985	0.10	0.41	-0.20	-0.20	-7.08	1.19	11.52	6.09	0.74
BANK DHOFAR	0.165	0.00	5.10	5.10	5.10	3.13	0.68	15.58	4.70	0.49
NAT BANK OF OMAN	0.295	0.00	1.72	1.72	1.72	5.36	0.70	10.24	2.88	0.48
OMINVEST	0.345	0.00	-1.43	-1.99	-1.99	-12.72	0.76	8.32	5.80	0.23

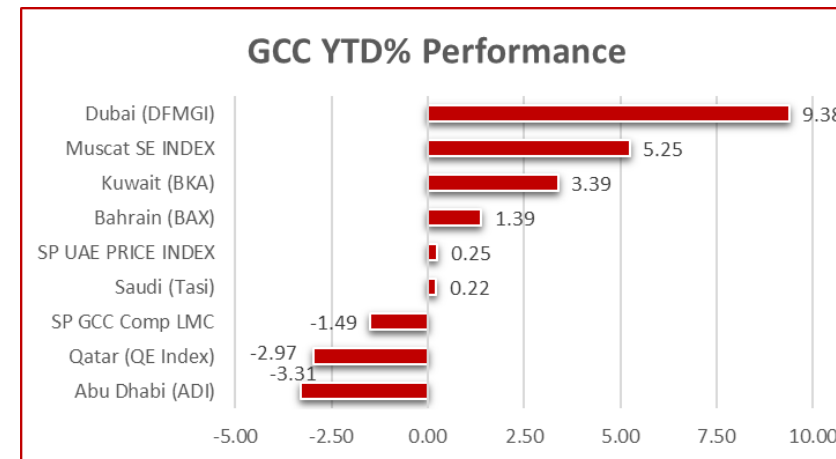
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
02-October. 24	24.76%	15.65%	0.06%	3.74%	7.96%	17.62%	13.06%	6.0%	5.85%
09-October. 24	24.73%	15.67%	0.06%	3.73%	7.96%	17.61%	12.99%	6.03%	5.84%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.03 %The leading sector best performance indices today are Utilities 1.37 % Consumer services 0.44 % Consumer Disc 0.34 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.37 %, SABIC have positive performance today by + 0.13%, STC has a positive performance today by + 0.24 %, Al Rajhi Bank has a positive performance today by + 1.67 %.



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