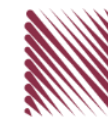


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday ,14th August 2024





Wednesday, August 14, 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)	11,849.7	0.45	1.56	-2.15	1.46	-0.98	2.99	22.81	3.32	10,167.78
Qatar (QE Index)	10,108.2	0.37	0.55	-0.45	1.41	-6.67	1.18	11.42	4.49	513.12
Dubai (DFMGI)	4,213.4	0.69	0.44	-1.28	4.55	3.78	1.48	8.40	5.72	637.99
Abu Dhabi (ADI)	9,225.6	0.55	-0.86	-1.21	1.82	-3.68	2.66	16.68	2.10	2,560.18
Bahrain (BAX)	1,941.1	0.36	1.59	-1.46	-4.17	-1.54	0.86	9.88	4.79	7.50
Muscat SE INDEX	4,682.9	0.49	0.82	0.46	-0.09	3.74	0.83	9.90	5.84	7.27
SP GCC Comp LMC	179.7	0.42	0.93	-1.74	2.71	-2.81	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.6	0.36	0.43	-0.67	5.41	-2.36				
Developed Markets										
MSCI World Index	3,522.4	0.59	2.17	-1.38	0.30	11.15				
U.S. (S&P 500)	5,455.2	0.38	2.08	-1.21	-0.10	14.37	4.49	25.91	1.62	48,090.32
U.K. (FTSE 100)	8,281.1	0.56	1.38	-1.04	1.43	7.08	1.75	14.96	3.71	2,154.15
Japan (topix)	2,581.9	1.11	3.97	-7.60	-8.11	9.11	1.35	14.08	2.25	908,617.70
Emerging Markets										
MSCI EM Index	1,076.6	0.52	1.24	-0.76	-0.89	5.16				
China (SSE Composite)	2,850.7	-0.60	-0.40	-3.00	-3.93	-4.18	1.36	12.00		44,025.04
India (Sensex)	79,105.9	0.19	-0.75	-3.22	0.09	9.50	4.34	23.09	1.16	157,059.56
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,093.3	1.19	0.39	-2.02	2.25	4.05	1.44	15.01	3.70	42.20
Kuwait Premier Index	7,716.1	1.26	0.25	-2.32	2.29	3.20	1.55	16.34	3.53	34.84
Kuwait Main Index	6,035.9	0.87	1.09	-0.54	2.09	8.37	1.05	10.49	4.53	7.36
Kuwait Sector										
Banking	1,758.6	1.32	0.24	-2.54	2.72	6.74	1.72	17.18	3.13	25.99
Telecom	985.1	1.72	0.25	-0.73	0.15	-10.86	1.42	11.69	8.68	2.96
Industrials	759.6	0.27	-0.38	-3.23	-1.68	-16.33	0.80	11.29	5.70	2.56
Financial Services	1,353.6	1.42	1.30	-0.80	3.23	11.66	1.10	11.89	2.96	4.47
Real Estate	1,326.1	0.53	1.31	-0.54	2.36	9.33	1.01	14.54	2.08	2.79
Basic Materials	757.6	1.11	1.44	1.01	0.28	1.57	1.35	13.15	11.69	0.42
Health Care	451.1	-3.61	-3.61	-3.61	2.15	-6.44	1.56	14.30	2.24	
Consumer Staples	1,021.6	3.79	-0.07	3.97	23.93	55.12	2.14	20.27	2.09	0.30
Insurance	2,302.8	0.01	-0.63	-2.99	-8.61	0.43	1.25	11.15	3.45	0.93
Consumer Discretionary	1,675.9	0.74	0.95	-1.04	8.83	4.49				
Energy	1,100.1	3.81	4.92	2.52	6.78	15.92	0.90	9.72	6.29	0.22
Technology	1,651.4	0.00	6.57	1.34	4.13	185.53	1.92	273.49		0.02
Utilities	405.3	0.65	-0.64	-4.35	-3.75	-10.98				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday, recovering some of the previous day's loss, on hopes of potential U.S. interest rate cuts boosting economic activity and fuel demand, though lingering concerns over slower global demand capped gains. Brent crude futures climbed 17 cents, or 0.2%, to \$79.93 a barrel.

Kuwait Market

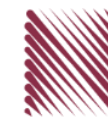
The market closed up by +1.19% at 7,093.3 value traded 54.2 million KD, Premier market value reached 42.1 million KD up by +1.26% at 7,716.1.

KSA Market

The market closed up by +0.45% at 11,849.7.

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)
Blue Chip Watch										
Kuwait										
NBK	0.883	2.56	1.61	-2.43	3.15	3.71	1.69	13.23	3.83	7.37
KFH	0.716	0.99	-0.56	-2.85	1.56	7.50	2.07	19.98	2.68	12.28
ZAIN	0.453	2.03	0.00	-0.44	1.57	-10.65	1.71	10.58	7.73	1.97
BOUBYAN BANK	0.586	1.21	0.34	-1.01	3.90	3.53	2.42	29.78	1.29	2.47
AGILITY	0.262	0.38	-1.13	-4.38	-6.09	-7.49	0.71	7.69	7.63	0.70
Saudi Arabia										
ARAMCO	28.15	-0.18	1.44	1.99	0.90	-14.70	4.51	15.62	6.75	6,807.76
SABIC	74.50	-1.06	-0.67	-5.46	0.95	-10.78	1.36	116.24	4.43	223.35
STC	39.25	0.38	3.15	1.95	3.02	-0.25	2.56	14.25	4.08	196.12
AL-RAJHI BANK	84.00	-0.59	-2.10	-1.87	5.00	-2.89	2.89	20.25	2.86	335.78
NCB	34.90	0.14	0.58	-8.16	-3.72	-9.70	1.16	10.67	5.16	209.26
Abu Dhabi										
ETISALAT.AD	16.76	-0.83	-1.87	2.32	4.10	-14.66	3.32	13.14	4.86	145.75
FAB.AD	13.42	-0.45	0.00	2.91	7.70	-3.87	1.20	9.30	5.29	148.25
EMIRATES NBD	19.55	2.09	1.03	2.36	18.48	13.01	1.06	5.49	6.14	123.48
DB ISLAMIC DB	5.78	0.00	-0.86	-1.20	0.70	1.05	0.94	6.34	7.79	41.85
EMAR.DU	8.28	0.24	1.60	-4.06	0.98	4.55	0.95	6.09	6.04	73.18
Qatar										
QNB	15.890	1.92	3.86	3.92	8.46	-3.87	1.35	9.84	4.12	146.75
INDUSTREIS QAT	12.950	-0.31	-0.15	-1.07	0.54	-0.99	2.08	15.03	5.41	78.34
QA ISLAMIC BK	19.450	-0.77	-0.51	-1.27	4.57	-9.53	1.55	10.95	3.15	45.95
MASRAF AL RAYA	2.227	0.09	-0.67	-4.42	-4.38	-16.12	0.85	14.48	4.49	20.71
MESAEED PETRO	1.619	1.19	-0.86	-3.23	-1.58	-9.45	1.24	22.70	5.31	20.34
Oman										
BANK MUSCAT	0.253	0.80	0.40	0.40	0.80	-4.17	0.81	9.63	6.13	1.90
OMANTEL	0.996	-0.40	-0.40	-0.40	-1.87	-6.04	1.22	11.24	6.02	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	0.275	1.85	3.77	3.77	8.70	-1.79	0.65	9.54	3.09	0.45
OMINVEST	0.335	0.00	0.00	-1.47	-5.63	-15.25	0.71	7.28	5.97	0.22

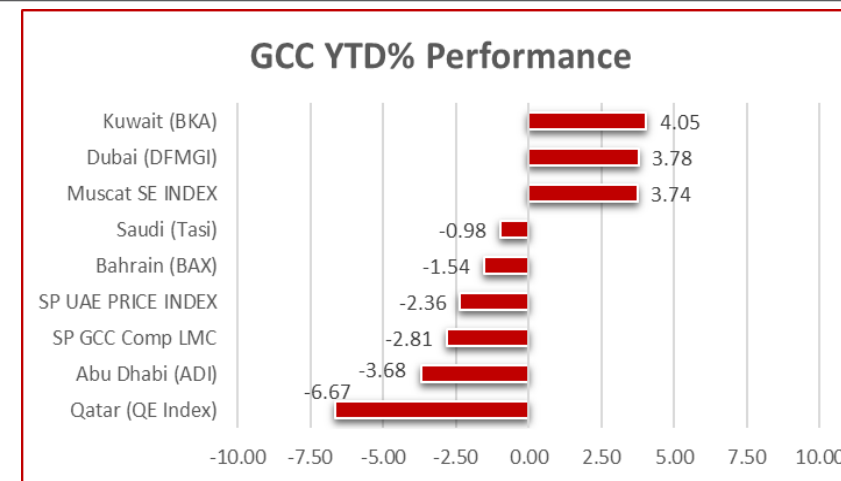
* GCC Markets performance at the latest close.

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 up today by + 1.19 %The leading sector best performance indices today are Energy 3.81 % Consumer services 3.79 % Telecom 1.72 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have negative performance today by -1.06%, STC has a positive performance today by + 0.38 %, Al Rajhi Bank have negative performance today by -0.59 %.



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