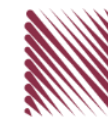


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , 14th July 2024

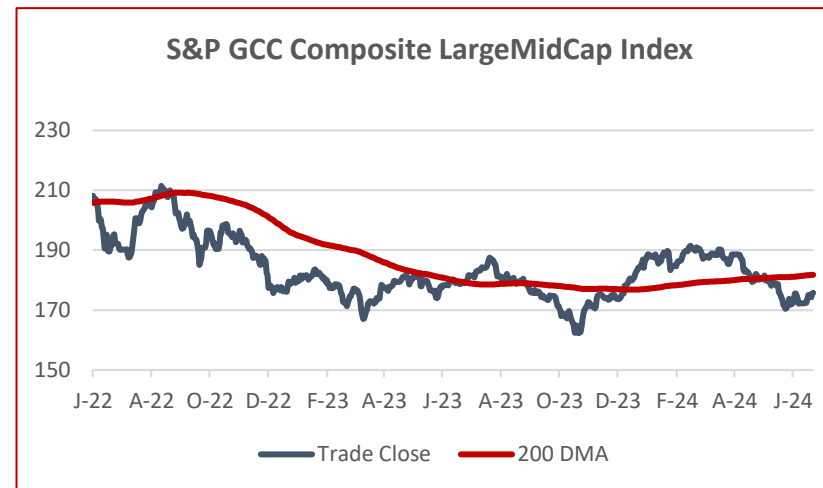




Sunday, July 14, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,881.6	0.76	0.76	1.73	1.73	-0.72	3.30	26.16	3.24	10,172.56
Qatar (QE Index)	10,172.0	-0.05	-0.05	2.05	2.05	-6.08	1.18	11.53	4.66	512.80
Dubai (DFMGI)	4,103.9	0.32	0.83	1.83	1.83	1.09	1.43	8.40	5.87	611.10
Abu Dhabi (ADI)	9,142.9	-0.09	0.04	0.91	0.91	-4.54	2.64	16.41	2.10	2,548.30
Bahrain (BAX)	1,981.6	-0.51	-0.51	-2.17	-2.17	0.51	0.89	11.31	4.48	7.66
Muscat SE INDEX	4,700.0	-0.01	-0.01	0.27	0.27	4.12	0.83	10.20	5.82	7.30
SP GCC Comp LMC	178.4	0.72	0.72	1.94	1.94	-3.55	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	129.6	0.00	0.00	1.50	1.50	-5.98				
Developed Markets										
MSCI World Index	3,627.5	0.59	1.30	3.30	3.30	14.46				
U.S. (S&P 500)	5,615.4	0.55	0.87	2.84	2.84	17.73	4.67	27.43	1.57	49,842.20
U.K. (FTSE 100)	8,252.9	0.36	0.60	1.09	1.09	6.72	1.76	14.84	3.69	2,151.58
Japan (topix)	2,894.6	-1.18	0.36	3.02	3.02	22.32	1.51	16.03	2.00	1,016,483.89
Emerging Markets										
MSCI EM Index	1,123.6	-0.12	1.69	3.44	3.44	9.75				
China (SSE Composite)	2,971.3	0.03	0.72	0.13	0.13	-0.12	1.36	12.00		44,025.04
India (Sensex)	80,519.3	0.78	0.65	1.88	1.88	11.46	4.97	23.93	1.12	159,417.18
Kuwait										
Kuwait All Share Index	7,126.0	0.40	0.40	2.73	2.73	4.53	1.45	15.22	3.61	42.72
Kuwait Premier Index	7,788.6	0.47	0.47	3.25	3.25	4.17	1.58	16.66	3.42	35.45
Kuwait Main Index	5,925.0	0.03	0.03	0.21	0.21	6.38	1.04	10.28	4.58	7.27
Kuwait Sector										
Banking	1,763.8	0.67	0.67	3.02	3.02	7.06	1.74	17.39	3.03	26.24
Telecom	998.0	-0.08	-0.08	1.45	1.45	-9.70	1.46	11.91	8.42	3.05
Industrials	792.1	-0.18	-0.18	2.51	2.51	-12.76	0.85	11.85	5.44	2.69
Financial Services	1,354.3	0.24	0.24	3.28	3.28	11.72	1.10	12.07	2.94	4.50
Real Estate	1,372.4	0.51	0.51	5.93	5.93	13.15	1.04	14.69	2.00	2.90
Basic Materials	755.1	0.12	0.12	-0.05	-0.05	1.23	1.36	13.23	11.61	0.43
Health Care	468.0	0.39	0.39	5.97	5.97	-2.93	1.56	14.21	1.85	
Consumer Staples	908.3	1.03	1.03	10.18	10.18	37.92	1.95	19.95	2.29	0.27
Insurance	2,175.2	-2.80	-2.80	-13.67	-13.67	-5.13	1.22	10.98	3.55	0.90
Consumer Discretionary	1,583.0	-0.26	-0.26	2.80	2.80	-1.30				
Energy	1,079.9	-0.18	-0.18	4.82	4.82	13.80	0.92	10.06	6.21	0.22
Technology	1,673.3	0.00	0.00	5.50	5.50	189.31	1.94	277.11		0.02
Utilities	442.1	0.60	0.60	5.00	5.00	-2.89				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell for a second day on Monday as the dollar gained ground amid political uncertainty in the U.S. following an attack on U.S. presidential candidate Donald Trump while investors eyed the progress of talks for a Gaza ceasefire. Brent crude futures fell 55 cents, or 0.7%, to \$84.48 a barrel.

Kuwait Market

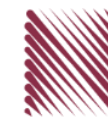
The market closed up by + 0.4% at 7,126.0 value traded 53.8 million KD, Premier market value reached 34.8 million KD up by + 0.47% at 7,788.6.

KSA Market

The market closed up by + 0.76% at 11,881.6.

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	0.864	0.58	0.58	0.93	0.93	1.48	1.70	13.06	3.86	7.07
KFH	0.734	0.96	0.96	4.11	4.11	10.20	2.15	21.60	2.50	12.10
ZAIN	0.457	0.00	0.00	2.47	2.47	-9.86	1.59	10.38	7.66	1.94
BOUBYAN BANK	0.584	0.86	0.86	3.55	3.55	3.17	2.46	31.16	1.29	2.36
AGILITY	0.289	0.35	0.35	3.58	3.58	2.04	0.78	8.49	6.92	0.75
Saudi Arabia										
ARAMCO	28.10	-0.18	-0.18	0.72	0.72	-14.85	4.46	15.50	6.67	6,774.01
SABIC	77.70	3.60	3.60	5.28	5.28	-6.95	1.40	203.81	4.25	221.93
STC	38.55	0.26	0.26	1.18	1.18	-2.02	2.39	14.31	4.15	189.94
AL-RAJHI BANK	81.40	1.12	1.12	1.75	1.75	-5.90	3.01	20.29	2.83	319.91
NCB	36.60	1.67	1.67	0.97	0.97	-5.30	1.21	11.30	4.78	216.84
Abu Dhabi										
ETISALAT.AD	16.00	-0.50	0.00	-0.62	-0.62	-18.53	3.19	13.32	5.00	141.05
FAB.AD	12.42	-0.32	-0.64	-0.32	-0.32	-11.03	1.15	8.63	5.72	139.19
EMIRATES NBD	16.85	0.90	2.12	2.12	2.12	-2.60	0.98	4.91	7.12	104.53
DB ISLAMIC DB	5.78	0.17	-1.03	0.70	0.70	1.05	0.98	6.44	7.79	41.63
EMAR.DU	8.10	0.62	1.25	-1.22	-1.22	2.27	0.90	6.31	6.17	71.94
Qatar										
QNB	15.130	0.20	0.20	3.28	3.28	-8.47	1.28	9.37	4.33	136.51
INDUSTREIS QAT	13.230	0.00	0.00	2.72	2.72	1.15	2.19	16.56	5.90	78.59
QA ISLAMIC BK	19.620	-0.41	-0.41	5.48	5.48	-8.74	1.62	11.21	3.70	44.90
MASRAF AL RAYA	2.328	-0.13	-0.13	-0.04	-0.04	-12.32	0.90	15.17	4.30	21.21
MESAIEED PETRO	1.668	-0.60	-0.60	1.40	1.40	-6.71	1.29	20.79	5.16	20.65
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.40	0.40	-4.55	0.82	9.83	6.15	1.88
OMANTEL	1.017	1.19	1.19	0.20	0.20	-4.06	1.24	11.48	5.90	0.76
BANK DHOFAR	0.160	0.00	0.00	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.260	0.00	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.41
OMINVEST	0.344	0.00	0.00	-3.10	-3.10	-12.98	0.73	7.47	5.81	0.23

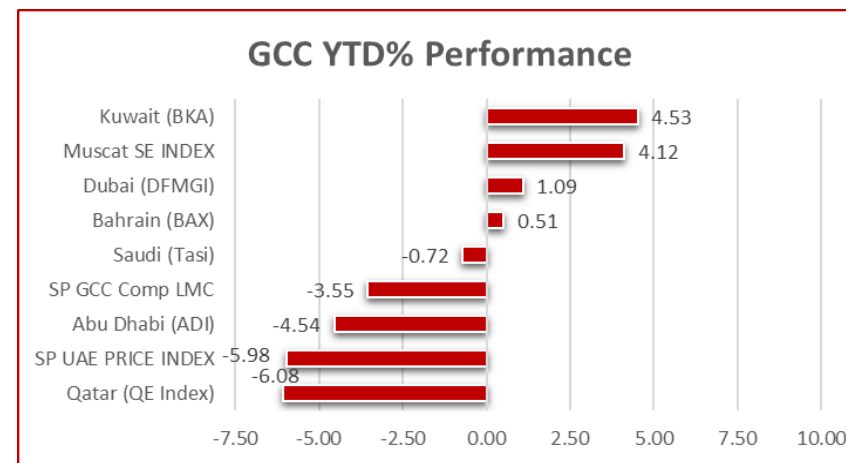
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
03-July-24	24.48%	13.69%	0.06%	2.36%	6.29%	17.67%	12.97%	6.0%	5.60%
10-July-24	24.45%	13.71%	0.06%	2.60%	6.30%	17.63%	12.96%	6.01%	5.60%

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 + 0.4 %The leading sector best performance indices today are Consumer services 1.03 % Banking 0.67 % Utilities 0.6 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have positive performance today by + 3.6 %, STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a positive performance today by + 1.12 %.



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