



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

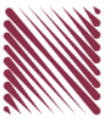
GCC DAILY MORNING BRIEF

Monday, 14th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

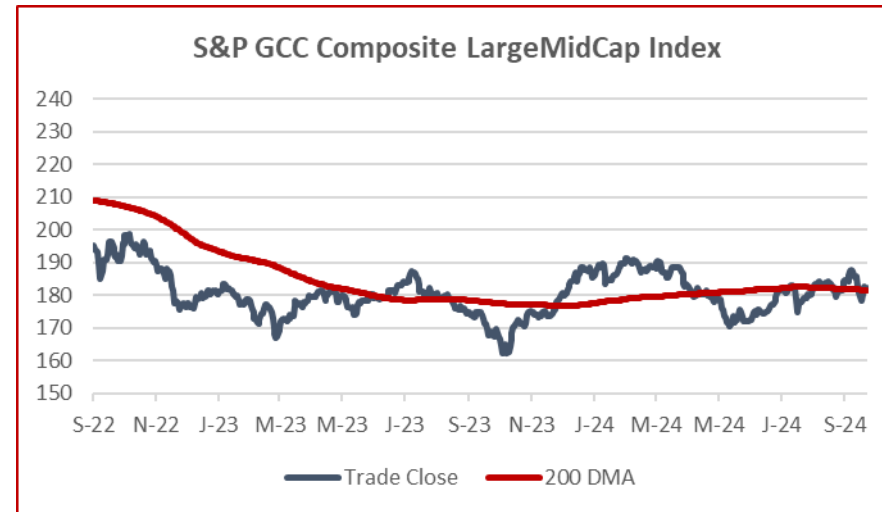


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,069.2	0.63	0.63	-1.28	-1.28	0.85	2.94	22.34	3.41	10,099.29
Qatar (QE Index)	10,493.3	-0.15	-0.15	-1.14	-1.14	-3.11	1.23	11.85	4.27	532.08
Dubai (DFMGI)	4,440.7	0.07	0.79	-1.39	-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	2.69	16.84	2.07	2,619.22
Bahrain (BAX)	1,997.9	-0.05	-0.05	-0.74	-0.74	1.34	0.91	10.40	4.57	7.74
Muscat SE INDEX	4,765.6	0.31	0.31	1.17	1.17	5.57	0.85	10.12	5.73	7.41
SP GCC Comp LMC	182.7	0.30	0.30	-1.55	-1.55	-1.20	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.2	0.00	0.00	-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	7,042.1	-0.09	-0.09	-1.32	-1.32	3.30	1.44	15.13	4.00	42.44
Kuwait Premier Index	7,572.9	-0.08	-0.08	-1.76	-1.76	1.28	1.55	16.19	3.84	34.65
Kuwait Main Index	6,322.2	-0.10	-0.10	0.73	0.73	13.51	1.11	11.42	4.76	7.79
Kuwait Sector										
Banking	1,721.8	-0.26	-0.26	-1.79	-1.79	4.51	1.71	17.08	3.17	25.86
Telecom	1,003.4	-0.14	-0.14	-2.40	-2.40	-9.21	1.47	12.13	8.37	3.07
Industrials	724.5	0.02	0.02	-0.15	-0.15	-20.20	0.77	11.25	9.76	2.45
Financial Services	1,414.4	1.42	1.42	0.27	0.27	16.68	1.14	12.45	2.95	4.66
Real Estate	1,384.9	0.36	0.36	0.68	0.68	14.18	1.06	15.10	2.06	2.93
Basic Materials	812.6	-1.09	-1.09	0.66	0.66	8.93	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	1,003.2	-0.47	-0.47	-0.07	-0.07	52.32	2.19	20.78	2.04	0.31
Insurance	1,957.0	-3.78	-3.78	-6.08	-6.08	-14.64	1.11	11.08	3.90	0.82
Consumer Discretionary	1,822.9	-0.17	-0.17	0.92	0.92	13.66				
Energy	1,095.4	0.21	0.21	-1.98	-1.98	15.42	0.93	9.29	5.80	0.22
Technology	1,033.1	-2.07	-2.07	-28.64	-28.64	78.62	1.22	439.39		0.01
Utilities	384.2	-1.35	-1.35	-1.35	-1.35	-15.61				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell by more than \$1 a barrel, losing over 1.5% in early trading on Monday, after disappointing Chinese inflation data and a lack of clarity on Beijing's economic stimulus plans stoked fears about demand. Brent crude futures were down \$1.26, or 1.59%, at \$77.78 per barrel.

Kuwait Market

The market down by -0.09% at 7,042.1 value traded 51.7 million KD, Premier market value reached 18.9 million KD down by -0.08% at 7,572.9.

KSA Market

The market closed up by +0.63% at 12,069.2.

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	0.864	-0.35	-0.35	-2.15	-2.15	1.48	1.65	12.95	3.91	7.19
KFH	0.709	-0.14	-0.14	-0.98	-0.98	6.45	2.05	19.79	2.70	12.12
ZAIN	0.460	0.22	0.22	-3.16	-3.16	-9.27	1.73	10.75	7.61	1.99
BOUBYAN BANK	0.538	-0.19	-0.19	-5.61	-5.61	-4.95	2.22	27.34	1.40	2.26
AGILITY	0.220	1.38	1.38	0.46	0.46	-22.32	0.64	7.12	9.09	0.59
Saudi Arabia										
ARAMCO	27.20	0.55	0.55	0.37	0.37	-17.58	4.36	15.10	6.98	6,586.26
SABIC	73.60	0.55	0.55	-1.74	-1.74	-11.86	1.35	114.83	4.48	220.93
STC	42.35	0.47	0.47	-3.09	-3.09	7.63	2.76	15.38	3.78	211.87
AL-RAJHI BANK	86.40	1.17	1.17	-0.92	-0.92	-0.12	2.97	20.83	2.78	345.80
NCB	34.75	-0.57	-0.57	1.31	1.31	-10.09	1.15	10.62	5.18	208.62
Abu Dhabi										
ETISALAT.AD	17.90	-0.11	2.17	-3.24	-3.24	-8.86	3.55	14.04	4.55	155.67
FAB.AD	13.10	-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	17.260	-0.17	-0.17	1.83	1.83	4.42	1.43	10.49	3.79	159.64
INDUSTREIS QAT	13.070	-0.38	-0.38	0.23	0.23	-0.08	2.10	15.17	5.36	79.18
QA ISLAMIC BK	20.870	-0.38	-0.38	-2.25	-2.25	-2.93	1.66	11.75	2.93	49.38
MASRAF AL RAYA	2.377	0.42	0.42	-3.77	-3.77	-10.47	0.91	15.46	4.21	22.14
MESAIEED PETRO	1.635	-0.18	-0.18	0.31	0.31	-8.56	1.25	22.92	4.28	20.57
Oman										
BANK MUSCAT	0.259	0.00	0.00	2.78	2.78	-1.89	0.83	9.86	5.98	1.95
OMANTEL	0.984	-0.10	-0.10	-0.30	-0.30	-7.17	1.19	11.51	6.10	0.74
BANK DHOFAR	0.165	0.00	0.00	5.10	5.10	3.13	0.68	15.58	4.70	0.49
NAT BANK OF OMAN	0.295	0.00	0.00	1.72	1.72	5.36	0.70	10.24	2.88	0.48
OMINVEST	0.348	0.87	0.87	-1.14	-1.14	-11.96	0.77	8.39	5.75	0.23

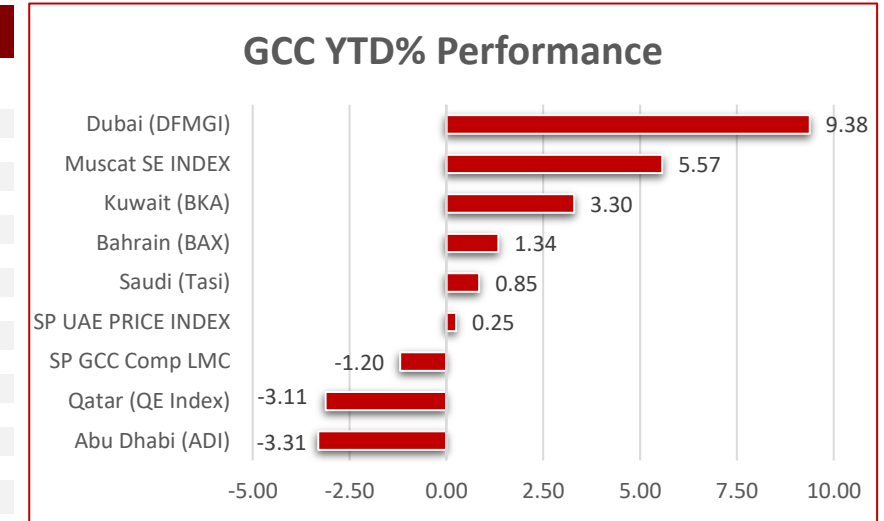
* GCC Markets performance at the latest close.

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 down today by -0.09 %The leading sector bottom performance indices today are Insurance -3.78 % Technology -2.07 % Utilities -1.35 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.55 %, SABIC have positive performance today by + 0.54%. STC has a positive performance today by + 0.47 %, Al Rajhi Bank has a positive performance today by + 1.17 %



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