

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

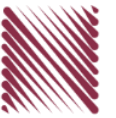
GCC DAILY MORNING BRIEF

Tuesday, 15th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

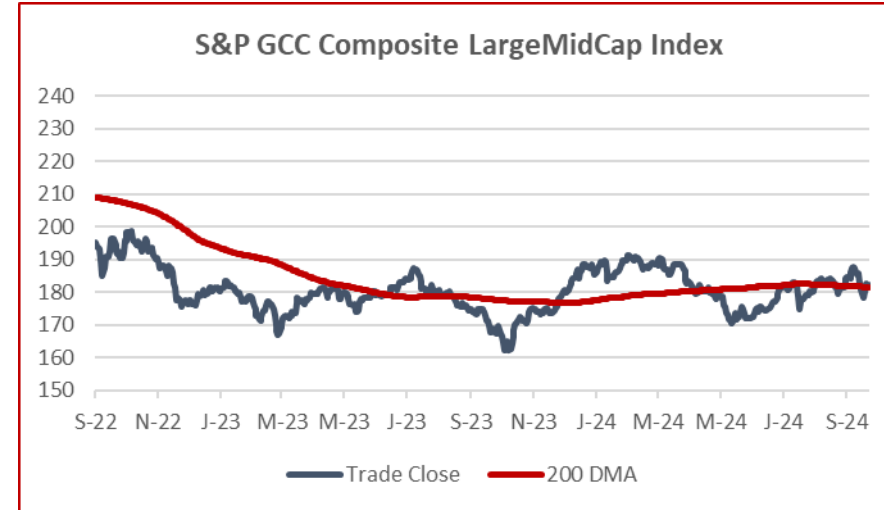


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,959.7	-0.91	-0.29	-2.18	-2.18	-0.06	2.91	22.16	3.44	10,063.24
Qatar (QE Index)	10,477.8	-0.15	-0.30	-1.28	-1.28	-3.26	1.23	11.83	4.27	531.47
Dubai (DFMGI)	4,455.0	0.32	0.32	-1.08	-1.08	9.73	1.57	8.78	5.36	676.57
Abu Dhabi (ADI)	9,303.0	0.46	0.46	-1.30	-1.30	-2.87	2.70	16.92	2.06	2,638.47
Bahrain (BAX)	1,994.9	-0.15	-0.20	-0.89	-0.89	1.19	0.90	10.39	4.58	7.73
Muscat SE INDEX	4,802.7	0.78	1.09	1.96	1.96	6.39	0.85	10.21	5.68	7.48
SP GCC Comp LMC	181.7	-0.55	-0.26	-2.09	-2.09	-1.74	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.8	0.47	0.47	-2.21	-2.21	0.72				

Developed Markets										
MSCI World Index	3,753.5	0.58	0.58	0.82	0.82	18.44				
U.S. (S&P 500)	5,859.9	0.77	0.77	1.69	1.69	22.85	4.82	28.18	1.53	51,758.43
U.K. (FTSE 100)	8,292.7	0.47	0.47	0.68	0.68	7.23	1.75	15.12	3.70	2,154.61
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	1,160.1	0.04	0.04	-0.92	-0.92	13.32				
China (SSE Composite)	3,284.3	2.07	2.07	-1.56	-1.56	10.40	1.36	12.00		44,025.04
India (Sensex)	81,973.1	0.73	0.73	-2.76	-2.76	13.47	4.38	23.77	1.11	162,390.78

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,041.0	-0.01	-0.10	-1.33	-1.33	3.28	1.44	15.12	4.00	42.40
Kuwait Premier Index	7,565.1	-0.10	-0.19	-1.86	-1.86	1.18	1.54	16.17	3.85	34.62
Kuwait Main Index	6,346.3	0.38	0.28	1.11	1.11	13.94	1.11	11.40	4.76	7.78
Kuwait Sector										
Banking	1,719.0	-0.16	-0.42	-1.95	-1.95	4.34	1.71	17.04	3.18	25.79
Telecom	1,008.4	0.50	0.36	-1.92	-1.92	-8.75	1.47	12.11	8.38	3.07
Industrials	729.6	0.71	0.73	0.56	0.56	-19.64	0.77	11.25	9.75	2.45
Financial Services	1,411.4	-0.21	1.21	0.06	0.06	16.43	1.16	12.63	2.91	4.73
Real Estate	1,382.0	-0.21	0.15	0.46	0.46	13.94	1.06	15.15	2.05	2.94
Basic Materials	808.5	-0.51	-1.59	0.15	0.15	8.38	1.46	12.33	10.78	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,009.3	0.61	0.14	0.54	0.54	53.26	2.18	20.69	2.05	0.30
Insurance	1,996.0	1.99	-1.86	-4.21	-4.21	-12.94	1.07	10.65	4.05	0.79
Consumer Discretionary	1,822.9	0.00	-0.17	0.92	0.92	13.65				
Energy	1,100.8	0.49	0.70	-1.50	-1.50	15.99	0.94	9.29	5.78	0.22
Technology	1,142.2	10.56	8.28	-21.11	-21.11	97.48	1.20	430.30		0.01
Utilities	386.8	0.68	-0.68	-0.68	-0.68	-15.03				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slid \$2 in early Asian trade on Tuesday as OPEC lowered its outlook for global oil demand growth in 2024 and 2025 and a media report that Israel is willing to strike Iranian military and not nuclear or oil targets. Brent crude futures were down \$2.11, or 2.7%, at \$75.35 per barrel.

Kuwait Market

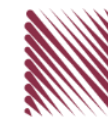
The market down by -0.01% at 7,041.0 value traded 60.5 million KD, Premier market value reached 25.1 million KD down by -0.10% at 7,565.1.

KSA Market

The market closed down by -0.91% at 11,959.7.

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	0.862	-0.23	-0.58	-2.38	-2.38	1.24	1.65	12.92	3.92	7.19
KFH	0.708	-0.14	-0.28	-1.12	-1.12	6.30	2.04	19.76	2.71	12.13
ZAIN	0.460	0.00	0.22	-3.16	-3.16	-9.27	1.73	10.75	7.61	1.99
BOUBYAN BANK	0.537	-0.19	-0.37	-5.79	-5.79	-5.13	2.21	27.29	1.41	2.26
AGILITY	0.226	2.73	4.15	3.20	3.20	-20.20	0.66	7.31	8.85	0.61
Saudi Arabia										
ARAMCO	27.20	0.00	0.55	0.37	0.37	-17.58	4.36	15.10	6.98	6,581.52
SABIC	72.90	-0.95	-0.41	-2.67	-2.67	-12.69	1.33	113.74	4.53	218.67
STC	42.75	0.94	1.42	-2.17	-2.17	8.65	2.79	15.52	3.74	213.72
AL-RAJHI BANK	85.00	-1.62	-0.47	-2.52	-2.52	-1.73	2.92	20.49	2.82	339.95
NCB	34.50	-0.72	-1.29	0.58	0.58	-10.74	1.14	10.55	5.22	206.97
Abu Dhabi										
ETISALAT.AD	17.88	-0.11	-0.11	-3.35	-3.35	-8.96	3.55	14.02	4.56	155.50
FAB.AD	13.32	1.68	1.68	-3.06	-3.06	-4.58	1.19	9.23	5.33	147.15
EMIRATES NBD	20.10	2.29	2.29	-0.99	-0.99	16.18	1.09	5.64	5.97	126.96
DB ISLAMIC DB	6.12	0.16	0.16	-2.86	-2.86	6.99	1.00	6.71	7.35	44.31
EMAR.DU	8.37	-0.95	-0.95	-4.01	-4.01	5.68	0.96	6.15	5.97	73.98
Qatar										
QNB	17.250	-0.06	-0.23	1.77	1.77	4.36	1.43	10.48	3.80	159.11
INDUSTREIS QAT	12.990	-0.61	-0.99	-0.38	-0.38	-0.69	2.09	15.08	5.39	78.48
QA ISLAMIC BK	20.800	-0.34	-0.72	-2.58	-2.58	-3.26	1.65	11.71	2.94	49.08
MASRAF AL RAYA	2.372	-0.21	0.21	-3.97	-3.97	-10.66	0.90	15.43	4.22	22.03
MESAIEED PETRO	1.639	0.24	0.06	0.55	0.55	-8.33	1.26	22.98	4.27	20.56
Oman										
BANK MUSCAT	0.264	1.93	1.93	4.76	4.76	0.00	0.84	10.05	5.87	1.98
OMANTEL	0.992	0.81	0.71	0.51	0.51	-6.42	1.20	11.60	6.05	0.74
BANK DHOFAR	0.168	1.82	1.82	7.01	7.01	5.00	0.70	15.86	4.61	0.50
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	0.355	2.01	2.90	0.85	0.85	-10.19	0.79	8.56	5.63	0.24

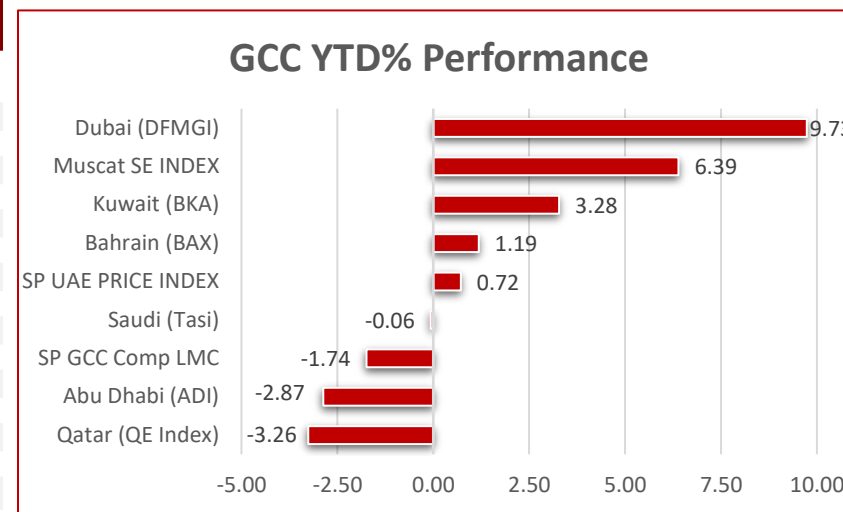
* GCC Markets performance at the latest close.

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 -0.01 % The leading sector bottom performance indices today are Basic materials -0.51 % Real estate -0.21 % Financial services -0.21 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -0.95%. STC has a positive performance today by + 0.94 %, Al Rajhi Bank have negative performance today by -1.62 %



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