



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 16th September 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,867.4	-0.28	0.21	-2.29	1.61	-0.84	3.00	22.85	3.44	9,973.62
Qatar (QE Index)	10,449.0	-0.10	0.49	2.41	4.83	-3.52	1.22	11.81	4.29	529.21
Dubai (DFMGI)	4,395.2	0.34	0.34	1.61	9.06	8.26	1.54	8.60	5.47	661.54
Abu Dhabi (ADI)	9,389.3	0.42	0.42	1.12	3.63	-1.97	2.71	16.98	2.07	2,591.16
Bahrain (BAX)	1,944.8	-0.39	-0.39	-0.65	-3.99	-1.36	0.87	9.93	4.77	7.52
Muscat SE INDEX	4,730.9	-0.31	-0.31	-0.33	0.93	4.80	0.84	10.05	5.77	7.36
SP GCC Comp LMC	181.5	-0.10	0.26	-0.98	3.70	-1.88	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.7	0.19	0.19	0.69	8.65	0.64				
Developed Markets										
MSCI World Index	3,640.7	0.16	0.16	-0.56	3.67	14.88				
U.S. (S&P 500)	5,633.1	0.13	0.13	-0.27	3.16	18.10	4.66	26.78	1.57	49,846.91
U.K. (FTSE 100)	8,278.4	0.06	0.06	-1.17	1.40	7.05	1.77	15.12	3.70	2,153.26
Japan (topix)	2,571.1	-0.82	-1.01	-5.22	-8.49	8.65	1.34	13.99	2.26	908,135.18
Emerging Markets										
MSCI EM Index	1,086.0	0.34	0.34	-1.26	-0.02	6.08				
China (SSE Composite)	2,704.1	-0.48	-2.23	-4.86	-8.87	-9.10	1.36	12.00		44,025.04
India (Sensex)	82,988.8	0.12	0.12	0.76	5.01	14.88	4.43	24.07	1.10	165,188.61
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,156.3	-0.03	-0.03	-0.34	3.16	4.97	1.47	15.39	3.71	43.09
Kuwait Premier Index	7,758.0	0.12	0.12	-0.82	2.84	3.76	1.58	16.58	3.50	35.42
Kuwait Main Index	6,189.8	-0.76	-0.76	1.96	4.69	11.13	1.10	11.20	4.80	7.66
Kuwait Sector										
Banking	1,760.8	0.15	0.15	-1.01	2.85	6.88	1.75	17.40	3.11	26.32
Telecom	1,009.3	0.77	0.77	-0.43	2.61	-8.67	1.47	12.09	8.39	3.06
Industrials	753.9	-0.08	-0.08	-0.90	-2.42	-16.96	0.80	11.73	5.72	2.55
Financial Services	1,430.1	-0.98	-0.98	2.26	9.06	17.97	1.18	12.95	2.86	4.83
Real Estate	1,346.4	0.55	0.55	0.20	3.92	11.00	1.03	14.48	2.11	2.83
Basic Materials	811.3	0.58	0.58	-0.68	7.38	8.76	1.45	13.94	10.86	0.46
Health Care	455.4	-3.49	-3.49	3.16	3.11	-5.56	1.58	17.85	2.22	
Consumer Staples	1,002.8	1.24	1.24	1.11	21.65	52.27	2.15	20.42	2.07	0.30
Insurance	1,987.8	-5.24	-5.24	1.33	-21.11	-13.30	1.14	11.43	3.78	0.85
Consumer Discretionary	1,814.4	0.25	0.25	2.31	17.82	13.13				
Energy	1,109.0	-1.04	-1.04	0.91	7.65	16.86	0.96	9.60	5.65	0.23
Technology	1,593.2	5.80	5.80	-0.45	0.46	175.47	1.75	627.27		0.02
Utilities	400.0	0.66	0.66	-0.65	-5.00	-12.14				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended gains on Tuesday as the market eyed U.S. output concerns in the aftermath of Hurricane Francine and expectations of lower U.S. crude stockpiles. Brent crude futures for November rose 16 cents, or 0.2% at \$72.91 a barrel.

Kuwait Market

The market closed down by -0.03% at 7,156.3 value traded 66.5 million KD, Premier market value reached 34.2 million KD up by +0.12% at 7,758.0.

KSA Market

The market closed down by -0.28% at 11,867.4.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.873	0.58	0.58	-0.57	1.99	2.53	1.67	13.08	3.87	7.26
KFH	0.720	0.00	0.00	-0.96	2.13	8.10	2.08	20.09	2.66	12.31
ZAIN	0.465	1.31	1.31	-0.43	4.26	-8.28	1.75	10.86	7.53	2.01
BOUBYAN BANK	0.576	0.00	0.00	-2.04	2.13	1.76	2.38	29.27	1.31	2.42
AGILITY	0.251	1.62	1.62	-1.95	-10.04	-11.38	0.73	8.12	7.97	0.67
Saudi Arabia										
ARAMCO	27.25	0.18	0.55	-2.50	-2.33	-17.42	4.37	15.12	6.97	6,595.20
SABIC	72.40	0.00	-0.28	-3.21	-1.90	-13.29	1.33	112.96	4.56	217.22
STC	42.40	0.24	0.24	-1.40	11.29	7.76	2.77	15.40	3.77	212.02
AL-RAJHI BANK	88.70	-0.22	0.91	0.68	10.88	2.54	3.05	21.39	2.71	354.84
NCB	34.10	-0.58	-0.29	-2.57	-5.93	-11.77	1.13	10.43	5.28	204.62
Abu Dhabi										
ETISALAT.AD	18.10	0.67	0.67	-0.22	12.42	-7.84	3.59	14.19	4.50	157.41
FAB.AD	13.60	0.15	0.15	1.49	9.15	-2.58	1.22	9.42	5.22	150.25
EMIRATES NBD	19.75	-1.25	-1.25	0.25	19.70	14.16	1.07	5.54	6.08	124.75
DB ISLAMIC DB	6.20	0.98	0.98	0.49	8.01	8.39	1.01	6.80	7.26	44.89
EMAR.DU	8.61	0.00	0.00	2.01	5.00	8.71	0.98	6.33	5.81	76.10
Qatar										
QNB	16.410	0.06	-0.30	3.60	12.01	-0.73	1.39	10.16	3.99	151.57
INDUSTREIS QAT	13.040	-0.08	0.23	1.09	1.24	-0.31	2.10	15.13	5.37	78.89
QA ISLAMIC BK	20.450	-0.29	0.49	4.66	9.95	-4.88	1.63	11.52	3.00	48.32
MASRAF AL RAYA	2.445	-0.20	1.83	6.30	4.98	-7.91	0.93	15.90	4.09	22.74
MESAIEED PETRO	1.642	0.06	0.31	-0.48	-0.18	-8.17	1.26	23.02	4.26	20.63
Oman										
BANK MUSCAT	0.259	-0.38	-0.38	0.39	3.19	-1.89	0.83	9.86	5.98	1.95
OMANTEL	1.004	-0.20	-0.20	-0.50	-1.08	-5.28	1.21	11.74	5.98	0.75
BANK DHOFAR	0.158	0.00	0.00	0.00	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.283	0.00	0.00	4.81	11.86	1.07	0.67	9.82	3.00	0.46
OMINVEST	0.360	-0.83	-0.83	9.09	1.41	-8.93	0.80	8.68	5.56	0.24

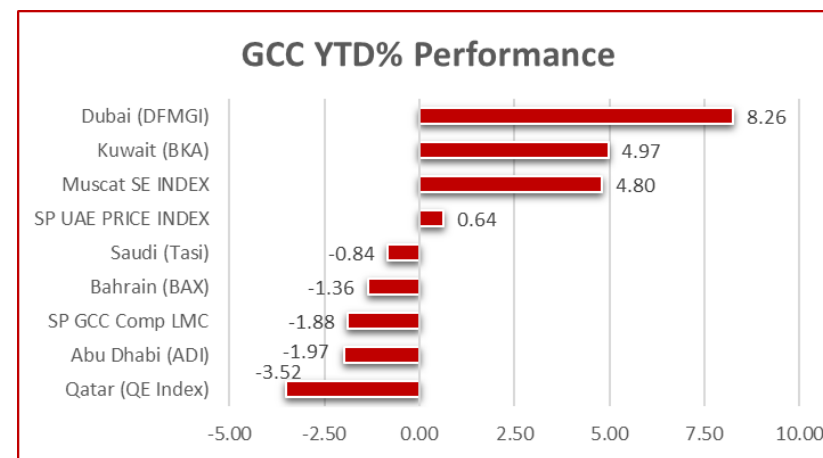
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
04-Sept. 24	24.65%	15.09%	0.06%	3.53%	7.78%	17.58%	12.96%	5.96%	5.62%
11-Sept. 24	24.62%	15.30%	0.06%	3.64%	7.83%	17.57%	12.97%	5.94%	5.64%

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 down today by -0.03 %The leading sector bottom performance indices today are Insurance -5.24 % Health care -3.49 % Energy -1.04 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC flat performance today 0 %, STC has a positive performance today by + 0.24 %, Al Rajhi Bank have negative performance today by -0.22 %.



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