



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 17th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

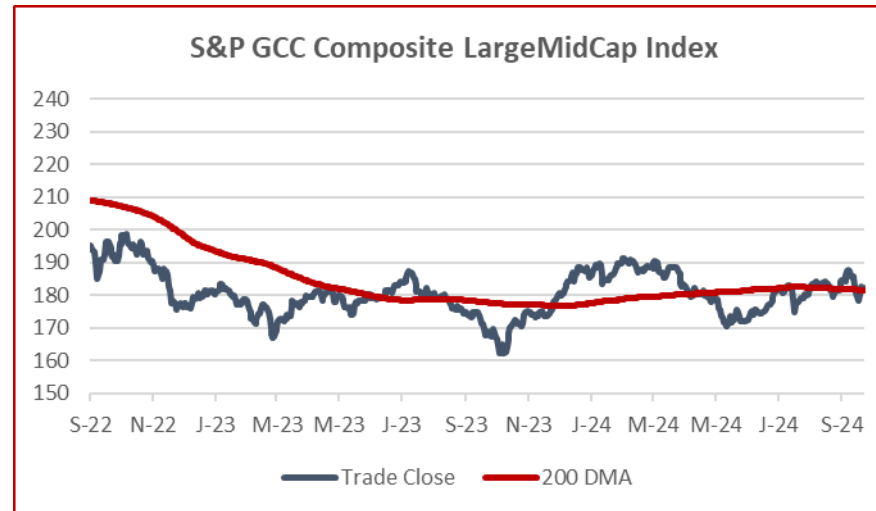


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,038.7	0.31	0.37	-1.53	-1.53	0.60	2.95	22.45	3.42	10,043.74
Qatar (QE Index)	10,735.4	0.87	2.15	1.14	1.14	-0.88	1.26	12.12	4.17	545.16
Dubai (DFMGI)	4,485.3	0.35	1.00	-0.40	-0.40	10.48	1.58	8.85	5.31	681.33
Abu Dhabi (ADI)	9,305.5	0.24	0.48	-1.27	-1.27	-2.84	2.70	16.92	2.06	2,645.65
Bahrain (BAX)	2,000.9	0.02	0.10	-0.59	-0.59	1.49	0.91	10.43	4.56	7.75
Muscat SE INDEX	4,813.1	0.22	1.31	2.18	2.18	6.62	0.86	10.28	5.64	7.53
SP GCC Comp LMC	183.4	0.41	0.69	-1.17	-1.17	-0.81	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.2	0.67	1.43	-1.27	-1.27	1.68				

Developed Markets										
MSCI World Index	3,735.3	0.18	0.09	0.33	0.33	17.86				
U.S. (S&P 500)	5,842.5	0.47	0.47	1.39	1.39	22.49	4.82	28.18	1.53	51,768.87
U.K. (FTSE 100)	8,329.1	0.97	0.91	1.12	1.12	7.70	1.75	15.20	3.68	2,164.28
Japan (topix)	2,690.7	-1.21	-0.57	1.69	1.69	13.70	1.40	14.64	2.16	947,599.55
Emerging Markets										
MSCI EM Index	1,144.0	-0.50	-1.34	-2.29	-2.29	11.75				
China (SSE Composite)	3,202.9	0.05	-0.46	-4.00	-4.00	7.66	1.36	12.00		44,025.04
India (Sensex)	81,501.4	-0.39	0.15	-3.32	-3.32	12.82	4.35	23.65	1.12	161,374.70

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,103.9	0.03	0.79	-0.45	-0.45	4.20	1.46	15.24	3.97	42.76
Kuwait Premier Index	7,621.3	0.01	0.55	-1.13	-1.13	1.93	1.55	16.27	3.82	34.84
Kuwait Main Index	6,445.8	0.11	1.85	2.69	2.69	15.73	1.13	11.58	4.68	7.92
Kuwait Sector										
Banking	1,731.4	0.07	0.30	-1.24	-1.24	5.10	1.72	17.12	3.16	25.92
Telecom	1,003.9	-0.20	-0.09	-2.35	-2.35	-9.16	1.47	12.14	8.36	3.07
Industrials	740.7	-0.74	2.26	2.08	2.08	-18.42	0.80	11.59	9.47	2.53
Financial Services	1,430.1	0.38	2.55	1.38	1.38	17.97	1.17	12.69	2.88	4.76
Real Estate	1,405.6	0.04	1.86	2.18	2.18	15.89	1.08	15.30	2.04	2.98
Basic Materials	823.5	0.99	0.24	2.01	2.01	10.40	1.47	12.37	10.74	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,012.4	0.00	0.44	0.85	0.85	53.72	2.20	20.88	2.03	0.31
Insurance	2,050.5	2.63	0.81	-1.60	-1.60	-10.57	1.09	10.87	3.97	0.81
Consumer Discretionary	1,858.0	-1.75	1.75	2.86	2.86	15.84				
Energy	1,115.3	-0.13	2.03	-0.20	-0.20	17.52	0.95	9.50	5.67	0.23
Technology	1,069.4	-4.55	1.38	-26.13	-26.13	84.91	1.30	466.67		0.02
Utilities	384.2	-2.01	-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 rose in early Asian trade on Thursday, paring sharp losses over the past two sessions, after industry data showed an unexpected drop in U.S. crude stockpiles last week. Brent crude futures rose 45 cents, or 0.6%, to \$74.67 a barrel.

Kuwait Market

The market up by +0.03% at 7,103.9 value traded 85.3 million KD, Premier market value reached 42.1 million KD up by 0.01% at 7,621.3.

KSA Market

The market closed up by +.031% at 12,038.7.

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	0.865	0.46	-0.23	-2.04	-2.04	1.59	1.65	12.96	3.91	7.20
KFH	0.715	0.00	0.70	-0.14	-0.14	7.35	2.07	19.96	2.68	12.23
ZAIN	0.454	-0.66	-1.09	-4.42	-4.42	-10.45	1.71	10.61	7.71	1.96
BOUBYAN BANK	0.539	0.00	0.00	-5.44	-5.44	-4.78	2.22	27.39	1.40	2.26
AGILITY	0.243	-3.57	11.98	10.96	10.96	-14.20	0.71	7.86	8.23	0.65
Saudi Arabia										
ARAMCO	27.10	-0.18	0.18	0.00	0.00	-17.88	4.34	15.04	7.01	6,560.47
SABIC	72.80	-0.27	-0.55	-2.80	-2.80	-12.81	1.33	113.58	4.53	218.48
STC	43.15	0.00	2.37	-1.26	-1.26	9.67	2.82	15.67	3.71	215.82
AL-RAJHI BANK	84.90	-0.12	-0.59	-2.64	-2.64	-1.85	2.92	20.47	2.83	339.72
NCB	35.20	0.57	0.72	2.62	2.62	-8.93	1.17	10.76	5.11	211.27
Abu Dhabi										
ETISALAT.AD	17.60	-0.23	-1.68	-4.86	-4.86	-10.39	3.49	13.80	4.63	153.08
FAB.AD	13.64	1.94	4.12	-0.73	-0.73	-2.29	1.22	9.45	5.21	150.71
EMIRATES NBD	20.30	0.50	3.31	0.00	0.00	17.34	1.10	5.70	5.91	128.24
DB ISLAMIC DB	6.14	-0.16	0.49	-2.54	-2.54	7.34	1.00	6.73	7.33	44.46
EMAR.DU	8.65	1.53	2.37	-0.80	-0.80	9.22	0.99	6.36	5.78	76.46
Qatar										
QNB	17.770	1.20	2.78	4.84	4.84	7.50	1.47	10.80	3.69	164.13
INDUSTREIS QAT	13.320	0.91	1.52	2.15	2.15	1.83	2.14	15.46	5.26	80.59
QA ISLAMIC BK	21.650	2.12	3.34	1.41	1.41	0.70	1.72	12.19	2.83	51.16
MASRAF AL RAYA	2.428	0.00	2.58	-1.70	-1.70	-8.55	0.90	15.51	4.12	22.58
MESAIEED PETRO	1.643	-0.18	0.31	0.80	0.80	-8.11	1.26	23.03	4.26	20.64
Oman										
BANK MUSCAT	0.27	1.89	4.25	7.14	7.14	2.27	0.86	10.28	5.74	2.03
OMANTEL	0.992	0.20	0.71	0.51	0.51	-6.42	1.20	11.60	6.05	0.74
BANK DHOFAR	0.168	0.00	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	0.57	2.90	0.85	0.85	-10.19	0.79	8.56	5.63	0.24

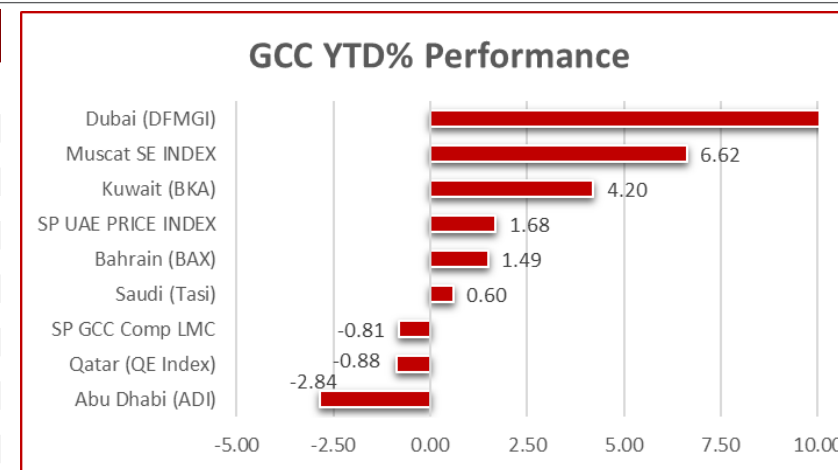
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
09-October. 24	24.73%	15.67%	0.06%	3.73%	7.96%	17.61%	12.99%	6.03%	5.84%
16-October. 24	24.73%	15.75%	0.06%	3.72%	7.91%	17.62%	12.98%	6.18%	5.85%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.03 %The leading sector best performance indices today are Insurance 2.63 % Basic materials 0.99 % Financial services 0.38 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have negative performance today by -0.27%, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.12 %.



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