

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 18th 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)	11,920.9	0.30	0.66	-1.85	2.07	-0.39	3.03	23.12	3.43	9,965.93
Qatar (QE Index)	10,406.7	0.01	0.08	2.00	4.41	-3.91	1.21	11.78	4.30	528.27
Dubai (DFMGI)	4,390.2	-0.11	0.22	1.50	8.94	8.14	1.55	8.61	5.48	661.37
Abu Dhabi (ADI)	9,422.6	-0.05	0.77	1.48	3.99	-1.62	2.72	17.05	2.06	2,607.29
Bahrain (BAX)	2,030.3	0.61	3.99	3.72	0.24	2.98	0.92	10.65	4.48	7.85
Muscat SE INDEX	4,719.7	0.13	-0.54	-0.56	0.69	4.56	0.84	10.02	5.79	7.34
SP GCC Comp LMC	182.1	0.25	0.60	-0.65	4.05	-1.54	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.5	-0.07	0.77	1.26	9.27	1.21				
Developed Markets										
MSCI World Index	3,629.7	-0.30	-0.14	-0.86	3.36	14.53				
U.S. (S&P 500)	5,618.3	-0.29	-0.14	-0.53	2.89	17.79	4.67	26.82	1.58	49,923.57
U.K. (FTSE 100)	8,253.7	-0.68	-0.23	-1.47	1.10	6.73	1.76	15.08	3.71	2,146.43
Japan (topix)	2,565.4	0.38	-0.22	-5.43	-8.69	8.41	1.34	13.96	2.26	907,196.13
Emerging Markets										
MSCI EM Index	1,087.8	-0.25	0.50	-1.11	0.14	6.25				
China (SSE Composite)	2,717.3	0.49	0.49	-4.40	-8.43	-8.66	1.36	12.00		44,025.04
India (Sensex)	82,948.2	-0.16	0.07	0.71	4.95	14.82	4.43	24.07	1.10	164,606.50
Kuwait										
Kuwait All Share Index	7,134.0	0.08	-0.34	-0.65	2.84	4.65	1.46	15.33	3.72	42.90
Kuwait Premier Index	7,747.2	0.05	-0.02	-0.96	2.70	3.61	1.58	16.57	3.50	35.40
Kuwait Main Index	6,120.3	0.21	-1.88	0.82	3.52	9.88	1.08	10.98	4.91	7.51
Kuwait Sector										
Banking	1,759.0	0.03	0.05	-1.11	2.74	6.77	1.75	17.40	3.11	26.33
Telecom	1,016.6	-0.16	1.50	0.29	3.35	-8.01	1.49	12.29	8.26	3.11
Industrials	752.0	-0.21	-0.35	-1.17	-2.68	-17.18	0.80	11.71	5.73	2.55
Financial Services	1,405.5	0.42	-2.68	0.50	7.19	15.94	1.15	12.57	2.95	4.68
Real Estate	1,337.3	0.53	-0.12	-0.47	3.22	10.26	1.02	14.40	2.13	2.82
Basic Materials	803.9	0.28	-0.33	-1.58	6.41	7.77	1.44	13.85	10.93	0.45
Health Care	455.4	0.00	-3.49	3.16	3.11	-5.56	1.52	17.22	2.30	
Consumer Staples	1,001.8	-0.17	1.14	1.00	21.52	52.11	2.18	20.69	2.05	0.30
Insurance	1,978.9	-0.22	-5.67	0.88	-21.46	-13.69	1.08	10.77	4.00	0.80
Consumer Discretionary	1,797.0	0.28	-0.71	1.33	16.69	12.04				
Energy	1,113.3	-0.10	-0.65	1.30	8.06	17.31	0.95	9.55	5.68	0.23
Technology	1,484.1	-6.85	-1.45	-7.27	-6.42	156.60	1.85	663.64		0.02
Utilities	394.7	0.00	-0.66	-1.96	-6.25	-13.29				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell in Asian trading on Thursday after a larger-than-expected Federal Reserve interest rate cut sparked concerns about the U.S. economy. Brent crude futures for November fell 34 cents, or 0.46%, to \$73.31 a barrel.

Kuwait Market

The market closed up by +0.08% at 7,134.0 value traded 49.0 million KD, Premier market value reached 21.7 million KD up by +0.05% at 7,747.2.

KSA Market

The market closed up by +0.30% at 11,920.9.

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	0.874	0.00	0.69	-0.46	2.10	2.65	1.67	13.10	3.87	7.27
KFH	0.719	0.00	-0.14	-1.10	1.99	7.95	2.08	20.07	2.67	12.29
ZAIN	0.471	-0.21	2.61	0.86	5.61	-7.10	1.77	11.00	7.43	2.04
BOUBYAN BANK	0.577	0.17	0.17	-1.87	2.30	1.94	2.38	29.32	1.31	2.42
AGILITY	0.247	-0.80	0.00	-3.52	-11.47	-12.79	0.72	7.99	8.10	0.66
Saudi Arabia										
ARAMCO	27.10	-0.37	0.00	-3.04	-2.87	-17.88	4.34	15.04	7.01	6,557.33
SABIC	72.90	0.28	0.41	-2.54	-1.22	-12.69	1.33	113.74	4.53	218.67
STC	42.75	0.83	1.06	-0.58	12.20	8.65	2.79	15.52	3.74	213.72
AL-RAJHI BANK	88.10	0.34	0.23	0.00	10.13	1.85	3.03	21.24	2.72	352.35
NCB	34.55	0.73	1.02	-1.29	-4.69	-10.61	1.15	10.56	5.21	207.27
Abu Dhabi										
ETISALAT.AD	18.50	0.22	2.89	1.98	14.91	-5.80	3.67	14.51	4.41	160.89
FAB.AD	13.80	0.15	1.62	2.99	10.75	-1.15	1.24	9.56	5.14	152.46
EMIRATES NBD	19.90	0.76	-0.50	1.02	20.61	15.03	1.08	5.58	6.03	125.70
DB ISLAMIC DB	6.20	0.00	0.98	0.49	8.01	8.39	1.01	6.80	7.26	44.89
EMAR.DU	8.53	-1.04	-0.93	1.07	4.02	7.70	0.98	6.27	5.86	75.40
Qatar										
QNB	16.470	0.12	0.06	3.98	12.42	-0.36	1.40	10.20	3.98	152.12
INDUSTREIS QAT	13.050	0.38	0.31	1.16	1.32	-0.23	2.10	15.15	5.36	78.95
QA ISLAMIC BK	20.300	0.25	-0.25	3.89	9.14	-5.58	1.61	11.43	3.02	47.97
MASRAF AL RAYA	2.410	-0.41	0.37	4.78	3.48	-9.23	0.92	15.67	4.15	22.41
MESAIEED PETRO	1.623	-0.73	-0.86	-1.64	-1.34	-9.23	1.24	22.75	4.31	20.39
Oman										
BANK MUSCAT	0.258	-0.39	-0.77	0.00	2.79	-2.27	0.82	9.82	6.01	1.94
OMANTEL	0.995	-1.39	-1.09	-1.39	-1.97	-6.13	1.20	11.64	6.03	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	0.275	0.00	-2.83	1.85	8.70	-1.79	0.65	9.54	3.09	0.45
OMINVEST	0.369	2.50	1.65	11.82	3.94	-6.65	0.82	8.90	5.42	0.25

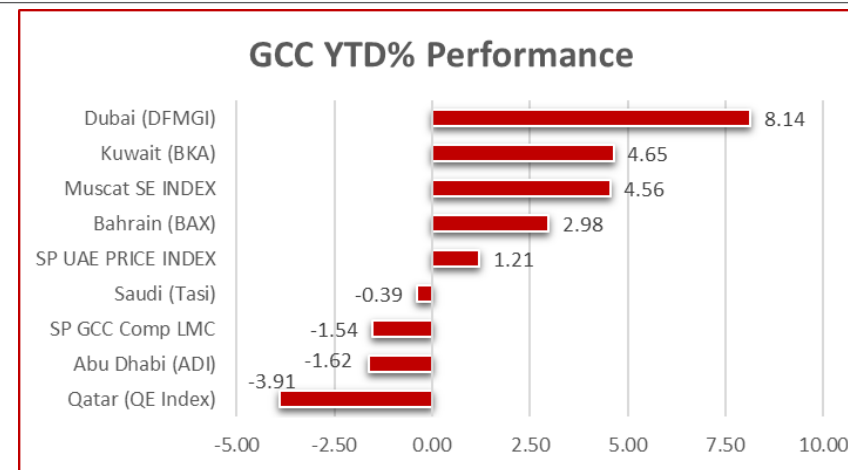
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
11-Sept. 24	24.62%	15.30%	0.06%	3.64%	7.83%	17.57%	12.97%	5.94%	5.64%
11-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%

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 + 0.08 %The leading sector best performance indices today are Real estate 0.53 % Financial services 0.42 % Basic materials 0.28% respectively.

KSA

Saudi Armco have negative performance today by -0.37 %, SABIC have positive performance today by + 0.27%, STC has a positive performance today by + 0.83 %, Al Rajhi Bank has a positive performance today by + 0.34 %.



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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