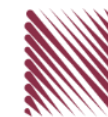


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday ,19th August 2024





Monday, August 19, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,023.0	0.35	0.91	-0.71	2.94	0.46	3.06	23.37	3.28	10,267.81
Qatar (QE Index)	10,155.8	0.20	0.30	0.02	1.89	-6.23	1.18	11.47	4.42	515.14
Dubai (DFMGI)	4,237.5	-0.13	-0.13	-0.72	5.15	4.38	1.48	8.22	5.72	640.57
Abu Dhabi (ADI)	9,305.4	0.21	0.21	-0.36	2.70	-2.85	2.69	13.30	2.08	2,567.37
Bahrain (BAX)	1,935.8	-0.39	-0.08	-1.73	-4.43	-1.81	0.86	9.83	4.80	7.48
Muscat SE INDEX	4,673.3	-0.39	-0.42	0.25	-0.30	3.53	0.83	9.93	5.84	7.27
SP GCC Comp LMC	180.7	0.16	0.31	-1.22	3.25	-2.30	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.9	-0.14	-0.14	-0.43	5.67	-2.12				
Developed Markets										
MSCI World Index	3,618.4	0.95	0.95	1.31	3.04	14.17				
U.S. (S&P 500)	5,608.3	0.97	0.97	1.56	2.71	17.58	4.60	26.54	1.58	49,155.85
U.K. (FTSE 100)	8,356.9	0.55	0.55	-0.13	2.36	8.07	1.77	15.11	3.66	2,173.43
Japan (topix)	2,641.1	-1.40	-1.40	-5.48	-6.00	11.61	1.38	14.40	2.20	928,934.34
Emerging Markets										
MSCI EM Index	1,103.5	0.90	0.90	1.73	1.59	7.79				
China (SSE Composite)	2,893.7	0.49	0.49	-1.53	-2.48	-2.73	1.36	12.00		44,025.04
India (Sensex)	80,424.7	-0.02	-0.02	-1.61	1.76	11.33	4.34	23.47	1.14	159,967.23

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,127.2	-0.01	0.28	-1.55	2.74	4.55	1.46	15.39	3.65	42.90
Kuwait Premier Index	7,756.8	-0.11	0.31	-1.81	2.83	3.74	1.58	16.67	3.46	35.50
Kuwait Main Index	6,050.3	0.46	0.10	-0.30	2.33	8.63	1.05	10.94	4.51	7.40
Kuwait Sector										
Banking	1,764.6	-0.20	0.04	-2.20	3.07	7.11	1.76	17.50	3.07	26.47
Telecom	986.2	-0.31	0.10	-0.62	0.26	-10.77	1.45	11.94	8.50	3.02
Industrials	765.8	0.92	1.08	-2.45	-0.89	-15.66	0.81	11.69	5.69	2.57
Financial Services	1,375.4	-0.07	0.84	0.80	4.89	13.46	1.10	12.55	2.94	4.60
Real Estate	1,334.5	-0.11	0.86	0.09	3.00	10.02	1.03	14.95	2.05	2.83
Basic Materials	766.5	1.07	1.64	2.19	1.45	2.75	1.36	13.10	11.55	0.43
Health Care	467.6	0.00	0.00	-0.09	5.88	-3.02	1.56	14.28	2.24	
Consumer Staples	1,025.4	0.60	2.82	4.35	24.38	55.70	2.21	21.02	2.02	0.31
Insurance	2,194.2	2.81	-3.78	-7.57	-12.92	-4.30	1.16	11.64	3.72	0.86
Consumer Discretionary	1,731.8	0.91	2.95	2.26	12.46	7.97				
Energy	1,057.3	-0.44	-0.74	-1.47	2.63	11.41	0.91	9.16	6.27	0.22
Technology	1,644.2	0.89	-0.44	0.89	3.67	184.28	1.89			0.02
Utilities	402.6	0.00	1.32	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

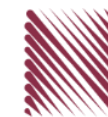
Oil prices edged lower on Tuesday as Israel accepted a proposal to tackle disagreements blocking a ceasefire deal in Gaza, helping ease worries about a supply disruption in the Middle East. Brent crude fell 12 cents, \$2.02, or 0.15%, to \$77.54.

Kuwait Market

The market closed down by -0.01% at 7,127.2 value traded 45.5 million KD, Premier market value reached 31.2 million KD down by -0.11% at 7,756.8.

KSA Market

The market closed up by +0.35% at 12,023.0.



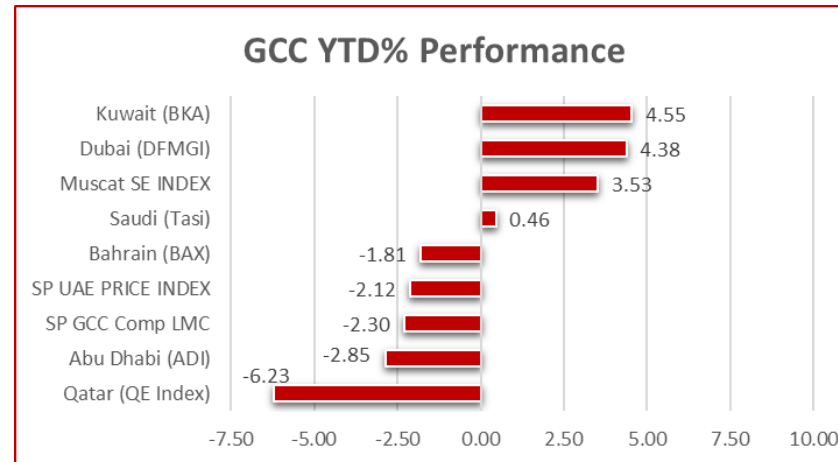
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.883	-0.56	-0.45	-2.43	3.15	3.71	1.69	13.23	3.83	7.39
KFH	0.717	0.00	0.14	-2.71	1.70	7.65	2.07	20.01	2.67	12.33
ZAIN	0.452	-0.44	-0.22	-0.66	1.35	-10.85	1.70	10.56	7.74	1.97
BOUBYAN BANK	0.587	-0.34	-0.17	-0.84	4.08	3.70	2.42	29.83	1.29	2.48
AGILITY	0.260	2.36	2.36	-5.11	-6.81	-8.20	0.76	8.41	7.69	0.70
Saudi Arabia										
ARAMCO	28.35	0.18	0.53	2.72	1.61	-14.09	4.55	15.73	6.70	6,857.04
SABIC	74.20	0.41	-0.54	-5.84	0.54	-11.14	1.36	115.77	4.45	222.48
STC	39.00	0.13	-0.26	1.30	2.36	-0.88	2.55	14.16	4.10	194.90
AL-RAJHI BANK	84.20	1.20	0.48	-1.64	5.25	-2.66	2.89	20.30	2.85	336.62
NCB	35.05	0.14	0.57	-7.76	-3.31	-9.31	1.16	10.72	5.14	210.19
Abu Dhabi										
ETISALAT.AD	17.12	2.03	2.03	4.52	6.34	-12.83	3.39	13.43	4.76	148.87
FAB.AD	13.22	-1.34	-1.34	1.38	6.10	-5.30	1.19	9.16	5.37	146.03
EMIRATES NBD	19.60	-1.01	-1.01	2.62	18.79	13.29	1.06	5.50	6.12	123.79
DB ISLAMIC DB	5.90	-0.17	-0.17	0.85	2.79	3.15	0.96	6.47	7.63	42.71
EMAR.DU	8.11	-0.49	-0.49	-6.03	-1.10	2.40	0.93	5.96	6.17	71.67
Qatar										
QNB	15.690	-0.44	-0.70	2.62	7.10	-5.08	1.33	9.71	4.17	144.84
INDUSTREIS QAT	13.200	0.23	1.15	0.84	2.48	0.92	2.13	15.32	5.30	79.82
QA ISLAMIC BK	19.350	0.26	0.16	-1.78	4.03	-10.00	1.54	10.90	3.17	45.70
MASRAF AL RAYA	2.229	0.27	0.18	-4.33	-4.29	-16.05	0.85	14.50	4.49	20.72
MESAIEED PETRO	1.658	1.59	2.35	-0.90	0.79	-7.27	1.27	23.24	4.22	20.82
Oman										
BANK MUSCAT	0.256	0.00	0.39	1.59	1.99	-3.03	0.82	9.75	6.05	1.92
OMANTEL	0.995	-0.60	-0.50	-0.50	-1.97	-6.13	1.20	11.64	6.03	0.75
BANK DHOFAR	0.160	0.00	0.00	3.90	-3.03	0.00	0.66	15.11	4.84	0.48
NAT BANK OF OMAN	0.275	0.00	0.00	3.77	8.70	-1.79	0.65	9.54	3.09	0.45
OMINVEST	0.335	0.00	0.00	-1.47	-5.63	-15.25	0.71	7.28	5.97	0.22

* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
07-August 24	24.49%	14.32%	0.06%	3.00%	7.20%	17.59%	12.99%	6.0%	5.66%
14-August 24	24.48%	14.56%	0.06%	3.04%	7.49%	17.58%	12.99%	5.97%	5.74%

End of Report

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* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.01 %The leading sector bottom performance indices today are Energy -0.44 % Telecom -0.31 % Banking -0.2 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC have positive performance today by + 0.4%, STC has a positive performance today by + 0.13 %, Al Rajhi Bank has a positive performance today by + 1.2 %.



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