



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 22th September 2024





Thursday, September 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)	12,080.5	1.34	2.01	-0.53	3.43	0.94	3.04	23.19	3.38	10,081.85
Qatar (QE Index)	10,464.2	0.55	0.63	2.56	4.98	-3.38	1.22	11.86	4.27	532.50
Dubai (DFMGI)	4,436.4	0.34	1.28	2.56	10.08	9.28	1.56	8.73	5.36	671.90
Abu Dhabi (ADI)	9,438.5	-0.65	0.94	1.65	4.17	-1.45	2.72	17.06	2.06	2,624.68
Bahrain (BAX)	2,027.6	-0.13	3.86	3.58	0.11	2.85	0.92	10.61	4.49	7.84
Muscat SE INDEX	4,725.1	0.11	-0.43	-0.45	0.81	4.68	0.84	10.04	5.78	7.36
SP GCC Comp LMC	184.4	1.27	1.88	0.61	5.37	-0.29	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.3	1.26	2.04	2.54	10.64	2.49				
Developed Markets										
MSCI World Index	3,676.8	1.65	1.50	0.77	5.06	16.42				
U.S. (S&P 500)	5,713.6	1.70	1.56	1.16	4.64	19.79	4.73	27.16	1.56	50,562.25
U.K. (FTSE 100)	8,230.0	-1.19	-0.52	-1.75	0.81	6.42	1.76	15.04	3.73	2,139.69
Japan (topix)	2,642.4	0.97	2.77	-2.59	-5.95	11.66	1.38	14.38	2.20	933,324.60
Emerging Markets										
MSCI EM Index	1,100.2	1.14	1.65	0.02	1.28	7.46				
China (SSE Composite)	2,736.8	0.03	1.21	-3.71	-7.77	-8.00	1.36	12.00		44,025.04
India (Sensex)	84,544.3	1.63	1.99	2.64	6.97	17.03	4.52	24.54	1.08	167,302.20
Kuwait										
Kuwait All Share Index	7,172.5	0.54	0.19	-0.12	3.39	5.21	1.47	15.43	3.70	43.17
Kuwait Premier Index	7,790.3	0.56	0.54	-0.41	3.27	4.19	1.59	16.67	3.48	35.61
Kuwait Main Index	6,148.3	0.46	-1.43	1.28	3.99	10.39	1.08	11.05	4.88	7.56
Kuwait Sector										
Banking	1,771.6	0.72	0.76	-0.40	3.48	7.54	1.76	17.53	3.09	26.52
Telecom	1,019.7	0.31	1.81	0.60	3.67	-7.73	1.49	12.31	8.24	3.12
Industrials	746.1	-0.78	-1.12	-1.94	-3.43	-17.82	0.80	11.59	5.79	2.52
Financial Services	1,415.7	0.72	-1.98	1.23	7.96	16.78	1.16	12.73	2.91	4.73
Real Estate	1,346.7	0.70	0.57	0.22	3.94	11.03	1.03	14.53	2.11	2.85
Basic Materials	813.4	1.18	0.84	-0.42	7.66	9.04	1.46	14.05	10.77	0.46
Health Care	455.4	0.00	-3.49	3.16	3.11	-5.56	1.52	17.22	2.30	
Consumer Staples	991.5	-1.03	0.10	-0.03	20.27	50.55	2.15	20.45	2.07	0.30
Insurance	1,973.1	-0.29	-5.94	0.58	-21.69	-13.94	1.08	10.71	4.02	0.80
Consumer Discretionary	1,796.0	-0.06	-0.76	1.27	16.63	11.98				
Energy	1,111.8	-0.14	-0.79	1.16	7.91	17.15	0.95	9.51	5.70	0.23
Technology	1,549.6	4.41	2.90	-3.18	-2.29	167.92	1.80	645.45		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 settled lower on Friday but recorded a second straight week of gains, garnering support from a U.S. interest rate cut and a dip in U.S. supply. Brent futures settled down 39 cents, or 0.52%, at \$74.49 a barrel. U.S. WTI crude futures settled down 3 cents, or 0.4%, to \$71.92.

Kuwait Market

The market closed up by +0.54% at 7,172.5 value traded 128.0 million KD, Premier market value reached 91.3 million KD up by +0.56% at 7,790.3.

KSA Market

The market closed up by +1.34% at 12,080.5.



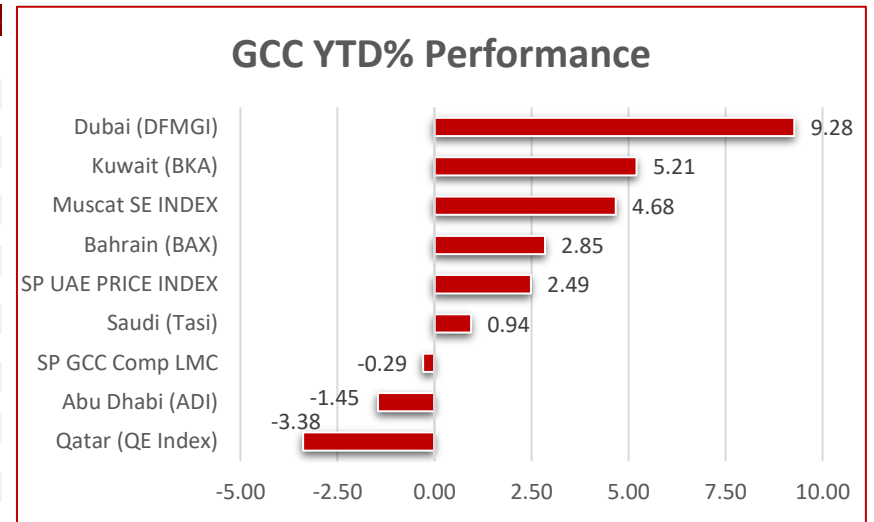
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.879	0.57	1.27	0.11	2.69	3.24	1.68	13.17	3.85	7.30
KFH	0.724	0.70	0.56	-0.41	2.70	8.70	2.09	20.21	2.65	12.30
ZAIN	0.473	0.42	3.05	1.28	6.05	-6.71	1.78	11.05	7.40	2.03
BOUBYAN BANK	0.588	1.91	2.08	0.00	4.26	3.88	2.43	29.88	1.28	2.44
AGILITY	0.246	-0.40	-0.40	-3.91	-11.83	-13.14	0.72	7.96	8.13	0.65
Saudi Arabia										
ARAMCO	27.40	1.11	1.11	-1.97	-1.79	-16.97	4.39	15.21	6.93	6,630.80
SABIC	73.10	0.27	0.69	-2.27	-0.95	-12.46	1.34	114.05	4.51	219.30
STC	43.65	2.11	3.19	1.51	14.57	10.94	2.85	15.85	3.67	218.25
AL-RAJHI BANK	89.90	2.04	2.28	2.04	12.38	3.93	3.09	21.68	2.67	359.60
NCB	35.20	1.88	2.92	0.57	-2.90	-8.93	1.17	10.76	5.11	211.20
Abu Dhabi										
ETISALAT.AD	18.60	0.11	3.56	2.65	15.65	-5.19	3.69	14.60	4.38	161.93
FAB.AD	13.76	-1.31	0.00	1.34	8.99	-2.72	1.22	9.41	5.23	150.03
EMIRATES NBD	20.35	0.49	1.75	3.30	23.33	17.63	1.11	5.71	5.90	128.54
DB ISLAMIC DB	6.28	1.29	2.28	1.78	9.41	9.79	1.03	6.88	7.17	45.47
EMAR.DU	8.73	0.58	1.39	3.44	6.46	10.23	1.00	6.42	5.73	77.16
Qatar										
QNB	16.800	2.00	2.07	6.06	14.68	1.63	1.43	10.40	3.90	155.91
INDUSTREIS QAT	12.990	-0.46	-0.15	0.70	0.85	-0.69	2.09	15.08	5.39	78.95
QA ISLAMIC BK	20.260	-0.20	-0.44	3.68	8.92	-5.77	1.61	11.41	3.02	48.32
MASRAF AL RAYA	2.429	0.79	1.17	5.61	4.29	-8.51	0.93	15.80	4.12	22.74
MESAIEED PETRO	1.640	1.05	0.18	-0.61	-0.30	-8.28	1.26	22.99	4.27	20.62
Oman										
BANK MUSCAT	0.259	0.39	-0.38	0.39	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.995	0.00	-1.09	-1.39	-1.97	-6.13	1.20	11.64	6.03	0.75
BANK DHOFAR	0.157	-0.63	-0.63	-0.63	-4.85	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.279	1.45	-1.41	3.33	10.28	-0.36	0.66	9.68	3.05	0.45
OMINVEST	0.369	0.00	1.65	11.82	3.94	-6.65	0.82	8.90	5.42	0.25

* GCC Markets performance at the latest close.

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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