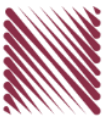


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday ,1st August 2024





Thursday, August 1, 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)	12,045.8	-0.53	0.16	-0.53	3.14	0.66	3.05	24.07	3.19	10,090.28
Qatar (QE Index)	10,130.8	-0.23	0.32	-0.23	1.64	-6.46	1.18	11.42	4.59	511.16
Dubai (DFMGI)	4,237.3	-1.00	-1.01	-0.72	5.14	4.37	1.48	8.46	5.71	637.77
Abu Dhabi (ADI)	9,292.2	-0.79	-0.27	-0.50	2.55	-2.98	2.68	16.49	2.07	2,571.13
Bahrain (BAX)	1,971.0	0.05	-0.21	0.05	-2.69	-0.03	0.87	11.12	4.60	7.62
Muscat SE INDEX	4,667.4	0.12	0.23	0.12	-0.42	3.40	0.83	9.88	5.86	7.25
SP GCC Comp LMC	182.0	-0.18	0.59	-0.51	4.00	-1.59	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.6	-1.01	-0.32	-0.66	5.42	-2.35				
Developed Markets										
MSCI World Index	3,448.8	-1.97	-2.14	-3.44	-1.79	8.82				
U.S. (S&P 500)	5,346.6	-1.84	-2.06	-3.18	-2.09	12.09	4.42	25.57	1.65	47,273.92
U.K. (FTSE 100)	8,174.7	-1.31	-1.34	-2.31	0.13	5.71	1.73	14.86	3.75	2,128.98
Japan (topix)	2,537.6	-6.14	-6.00	-9.19	-9.68	7.24	1.33	14.03	2.28	894,517.84
Emerging Markets										
MSCI EM Index	1,061.2	-2.44	-1.03	-2.17	-2.30	3.66				
China (SSE Composite)	2,905.3	-0.92	0.50	-1.14	-2.09	-2.34	1.36	12.00		44,025.04
India (Sensex)	80,982.0	-1.08	-0.43	-0.93	2.47	12.10	4.51	23.71	1.13	160,737.94
Kuwait										
Kuwait All Share Index	7,214.1	-0.35	0.83	-0.35	4.00	5.82	1.48	15.40	3.60	43.44
Kuwait Premier Index	7,865.5	-0.43	0.83	-0.43	4.27	5.19	1.60	16.79	3.42	35.96
Kuwait Main Index	6,071.6	0.05	0.83	0.05	2.69	9.01	1.07	10.62	4.46	7.48
Kuwait Sector										
Banking	1,796.6	-0.43	1.75	-0.43	4.94	9.05	1.78	17.76	3.02	26.90
Telecom	988.4	-0.40	-0.88	-0.40	0.48	-10.57	1.45	11.68	8.50	3.02
Industrials	784.3	-0.08	-1.04	-0.08	1.51	-13.61	0.84	11.66	5.51	2.65
Financial Services	1,363.7	-0.06	0.17	-0.06	4.00	12.50	1.11	12.22	2.92	4.57
Real Estate	1,329.3	-0.31	-1.03	-0.31	2.60	9.59	1.02	14.30	2.05	2.83
Basic Materials	753.0	0.40	0.76	0.40	-0.33	0.95	1.35	13.21	11.63	0.42
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	967.9	-1.50	-15.54	-1.50	17.40	46.96	2.10	21.48	2.12	0.29
Insurance	2,367.9	-0.25	2.80	-0.25	-6.02	3.28	1.29	11.64	3.35	0.96
Consumer Discretionary	1,689.6	-0.24	-0.11	-0.24	9.72	5.34				
Energy	1,062.3	-1.01	1.08	-1.01	3.11	11.94	0.91	9.87	6.30	0.22
Technology	1,629.6	0.00	0.90	0.00	2.75	181.76	1.89	269.88		0.02
Utilities	423.7	0.00	-1.83	0.00	0.62	-6.94				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

U.S. crude oil fell nearly 3% on Friday, after a weak jobs report raised renewed fears that a recession could be on the horizon. The Brent October contract dropped \$2.71, or 3.41%, to settle at \$76.81 per barrel.

Kuwait Market

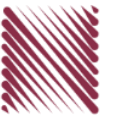
The market closed down by -0.35% at 7,214.1 value traded 49.9 million KD, Premier market value reached 39.5 million KD down by -0.43% at 7,865.5.

KSA Market

The market closed down by -0.53% at 12,045.8.

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	0.900	-0.55	3.09	-0.55	5.14	5.70	1.72	13.49	3.76	7.53
KFH	0.734	-0.41	0.14	-0.41	4.11	10.20	2.12	20.49	2.61	12.62
ZAIN	0.453	-0.44	-0.44	-0.44	1.57	-10.65	1.58	10.29	7.73	1.97
BOUBYAN BANK	0.586	-1.01	2.45	-1.01	3.90	3.53	2.42	29.78	1.29	2.47
AGILITY	0.276	0.73	-2.47	0.73	-1.08	-2.55	0.74	8.10	7.25	0.74
Saudi Arabia										
ARAMCO	27.50	-0.36	-1.79	-0.36	-1.43	-16.67	4.37	15.17	6.81	6,651.81
SABIC	79.40	0.76	2.06	0.76	7.59	-4.91	1.43	208.27	4.16	238.09
STC	38.35	-0.39	-2.04	-0.39	0.66	-2.53	2.50	13.93	4.17	191.66
AL-RAJHI BANK	85.00	-0.70	1.80	-0.70	6.25	-1.73	3.14	21.19	2.71	339.84
NCB	38.05	0.13	2.56	0.13	4.97	-1.55	1.26	11.75	4.60	228.19
Abu Dhabi										
ETISALAT.AD	16.60	1.45	-2.43	2.81	4.60	-14.26	3.34	13.21	4.84	146.44
FAB.AD	13.30	-1.50	3.97	0.46	5.14	-6.16	1.17	9.08	5.42	144.71
EMIRATES NBD	19.05	-1.30	3.25	-0.26	15.45	10.12	1.03	5.35	6.30	120.32
DB ISLAMIC DB	5.92	0.00	0.00	1.20	3.14	3.50	0.97	6.49	7.60	42.86
EMAR.DU	8.39	-2.44	-3.89	-2.78	2.32	5.93	0.94	6.54	5.96	74.15
Qatar										
QNB	15.400	0.72	0.85	0.72	5.12	-6.84	1.31	9.53	4.25	142.24
INDUSTREIS QAT	12.840	-1.91	-1.98	-1.91	-0.31	-1.83	2.13	16.07	6.07	77.68
QA ISLAMIC BK	19.530	-0.86	1.88	-0.86	5.00	-9.16	1.55	11.00	3.14	46.15
MASRAF AL RAYA	2.317	-0.56	-0.56	-0.56	-0.52	-12.73	0.88	15.07	4.32	21.55
MESAIEED PETRO	1.669	-0.24	0.24	-0.24	1.46	-6.66	1.29	20.80	5.15	20.97
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.00	0.40	-4.55	0.80	9.60	6.15	1.89
OMANTEL	1.002	0.20	0.20	0.20	-1.28	-5.47	1.22	11.31	5.99	0.75
BANK DHOFAR	0.154	0.00	0.00	0.00	-6.67	-3.75	0.64	14.54	5.03	0.46
NAT BANK OF OMAN	0.265	0.00	1.92	0.00	4.74	-5.36	0.63	9.20	3.21	0.43
OMINVEST	0.340	0.00	0.00	0.00	-4.23	-13.99	0.72	7.39	5.88	0.23

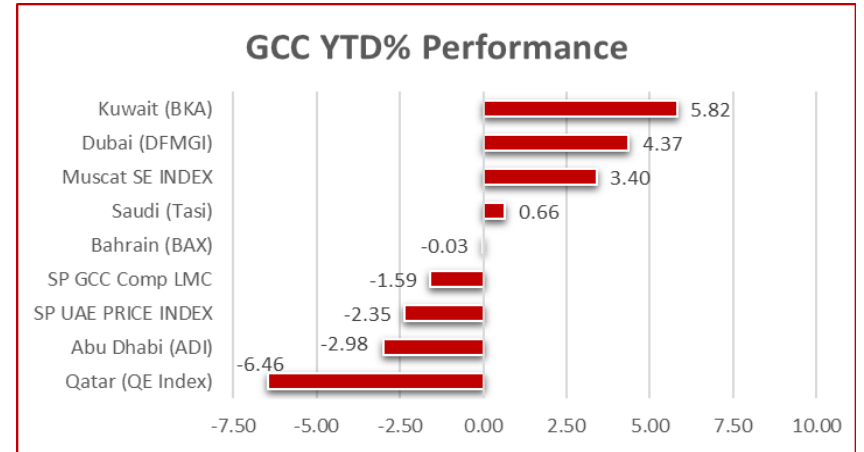
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
24-July-24	24.42%	14.01%	0.06%	2.75%	6.84%	17.61%	12.93%	6.02%	5.67%
31-July-24	24.42%	14.01%	0.06%	2.85%	6.89%	17.59%	12.97%	6.0%	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 down today by -0.35 %The leading sector bottom performance indices today are Consumer services -1.5 % Energy -1.01 % Banking -0.43 % respectively.

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have positive performance today by + 0.76%, STC have negative performance today by -0.39 %, Al Rajhi Bank have negative performance today by -0.7 %.



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