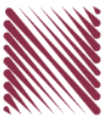


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 1st July 2024

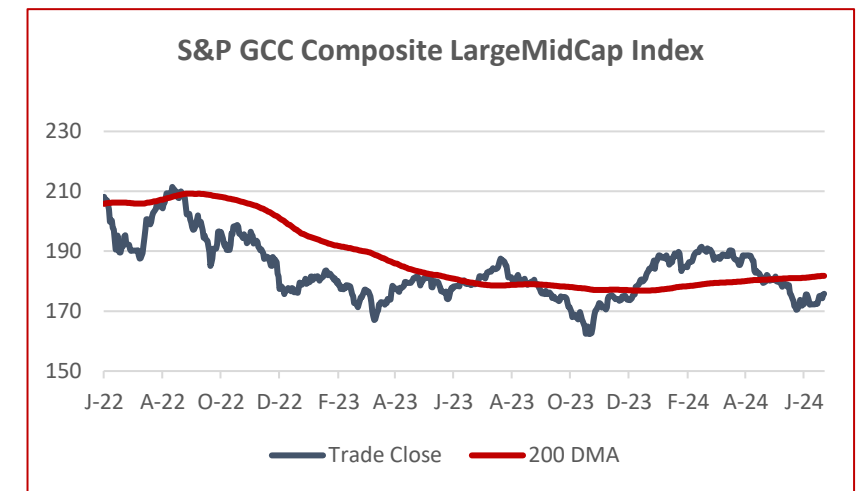




Monday, July 1, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,658.5	-0.18	-0.61	-0.18	-0.18	-2.58	3.07	24.37	3.30	10,069.13
Qatar (QE Index)	10,006.5	0.39	0.45	0.39	0.39	-7.61	1.16	11.42	4.73	503.43
Dubai (DFMGI)	4,057.0	0.67	0.67	0.67	0.67	-0.07	1.41	8.30	5.95	600.95
Abu Dhabi (ADI)	9,060.0	-0.01	-0.01	-0.01	-0.01	-5.41	2.61	16.28	2.12	2,536.33
Bahrain (BAX)	2,017.2	-0.41	-0.67	-0.41	-0.41	2.32	0.86	10.92	4.31	7.96
Muscat SE INDEX	4,696.0	0.19	0.17	0.19	0.19	4.03	0.80	10.04	5.84	6.47
SP GCC Comp LMC	175.0	-0.03	-0.46	-0.03	-0.03	-5.40	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.2	0.44	0.44	0.44	0.44	-6.97				
Developed Markets										
MSCI World Index	3,520.0	0.24	0.24	0.24	0.24	11.07				
U.S. (S&P 500)	5,475.1	0.27	0.27	0.27	0.27	14.79	4.54	26.77	1.61	48,454.43
U.K. (FTSE 100)	8,166.8	0.03	0.03	0.03	0.03	5.61	1.72	14.69	3.73	2,134.91
Japan (topix)	2,824.3	0.52	0.52	0.52	0.52	19.35	1.47	15.64	2.05	992,531.83
Emerging Markets										
MSCI EM Index	1,087.4	0.10	0.10	0.10	0.10	6.22				
China (SSE Composite)	2,994.7	0.92	0.92	0.92	0.92	0.67	1.36	12.00		44,025.04
India (Sensex)	79,476.2	0.56	0.56	0.56	0.56	10.02	5.02	23.62	1.12	156,788.46
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,943.0	0.09	-0.35	0.09	0.09	1.84	1.42	14.86	3.70	41.75
Kuwait Premier Index	7,539.7	-0.05	-0.48	-0.05	-0.05	0.84	1.54	16.21	3.51	34.49
Kuwait Main Index	5,957.2	0.76	0.31	0.76	0.76	6.96	1.03	10.27	4.59	7.25
Kuwait Sector										
Banking	1,712.7	0.04	-0.66	0.04	0.04	3.96	1.70	17.00	3.10	25.64
Telecom	984.0	0.03	0.22	0.03	0.03	-10.96	1.44	11.73	8.55	3.01
Industrials	774.7	0.27	1.53	0.27	0.27	-14.67	0.81	11.51	5.59	2.61
Financial Services	1,305.8	-0.41	-0.28	-0.41	-0.41	7.72	1.07	11.76	3.04	4.37
Real Estate	1,301.7	0.47	0.47	0.47	0.47	7.32	0.99	13.90	2.11	2.75
Basic Materials	756.0	0.06	-0.58	0.06	0.06	1.35	1.36	13.25	11.59	0.43
Health Care	441.6	0.00	0.00	0.00	0.00	-8.40	1.57	10.39	1.95	
Consumer Staples	852.5	3.41	3.97	3.41	3.41	29.44	1.79	18.30	2.49	0.25
Insurance	2,551.2	1.25	-0.91	1.25	1.25	11.27	1.37	12.41	3.15	1.02
Consumer Discretionary	1,535.4	-0.30	-2.00	-0.30	-0.30	-4.27				
Energy	1,049.3	1.85	0.63	1.85	1.85	10.57	0.88	9.53	6.54	0.21
Technology	1,629.6	2.75	0.45	2.75	2.75	181.76	1.84	262.65		0.02
Utilities	421.1	0.00	0.63	0.00	0.00	-7.51				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were little changed on Tuesday, holding near the two-month highs reached in the previous session, on expectations for rising fuel demand from the summer travel season and possible U.S. interest rate cuts that could boost economic growth. Brent crude futures rose 20 cents to \$86.80 per barrel.

Kuwait Market

The market closed up by + 0.09% at 6,943.0 value traded 34.5 million KD, Premier market value reached 27.3 million KD down by - 0.05% at 7,539.7.

KSA Market

The market closed down by - 0.18% at 11,658.5

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	0.851	-0.58	-1.28	-0.58	-0.58	-0.05	1.68	12.86	3.92	7.09
KFH	0.706	0.14	-0.56	0.14	0.14	6.00	2.07	20.78	2.60	12.09
ZAIN	0.446	0.00	0.22	0.00	0.00	-12.03	1.55	10.13	7.85	1.93
BOUBYAN BANK	0.563	-0.18	-0.53	-0.18	-0.18	-0.54	2.37	30.04	1.34	2.37
AGILITY	0.280	0.36	1.82	0.36	0.36	-1.14	0.75	8.22	7.14	0.75
Saudi Arabia										
ARAMCO	28.00	0.36	1.08	0.36	0.36	-15.15	4.45	15.44	6.69	6,774.19
SABIC	74.00	0.27	0.68	0.27	0.27	-11.38	1.33	194.11	4.46	221.94
STC	38.00	-0.26	1.33	-0.26	-0.26	-3.42	2.35	14.10	4.21	189.95
AL-RAJHI BANK	80.00	0.00	-1.84	0.00	0.00	-7.51	2.96	19.94	2.88	319.91
NCB	36.15	-0.28	-1.50	-0.28	-0.28	-6.47	1.19	11.16	4.84	216.84
Abu Dhabi										
ETISALAT.AD	16.10	0.00	0.00	0.00	0.00	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.52	0.48	0.48	0.48	0.48	-10.32	1.16	8.70	5.67	138.29
EMIRATES NBD	16.40	-0.61	-0.61	-0.61	-0.61	-5.20	0.96	4.78	7.32	103.58
DB ISLAMIC DB	5.76	0.35	0.35	0.35	0.35	0.70	0.97	6.42	7.81	41.70
EMAR.DU	8.23	0.37	0.37	0.37	0.37	3.91	0.92	6.41	6.08	72.73
Qatar										
QNB	14.720	0.48	0.75	0.48	0.48	-10.95	1.30	9.30	4.42	135.77
INDUSTREIS QAT	12.950	0.54	1.17	0.54	0.54	-0.99	2.14	16.21	6.02	78.24
QA ISLAMIC BK	18.880	1.51	1.51	1.51	1.51	-12.19	1.56	10.79	3.84	44.55
MASRAF AL RAYA	2.299	-1.29	-1.46	-1.29	-1.29	-13.41	0.89	14.99	4.35	21.35
MESAIEED PETRO	1.650	0.30	0.24	0.30	0.30	-7.72	1.28	20.57	5.21	20.70
Oman										
BANK MUSCAT	0.251	0.00	0.40	0.00	0.00	-4.92	0.82	9.79	6.18	1.89
OMANTEL	1.011	-0.39	1.10	-0.39	-0.39	-4.62	1.23	11.41	5.93	0.76
BANK DHOFAR	0.160	-3.03	-3.03	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.255	0.79	0.00	0.79	0.79	-8.93	0.61	8.93	3.33	0.42
OMINVEST	0.355	0.00	-1.39	0.00	0.00	-10.19	0.75	7.71	5.63	0.24

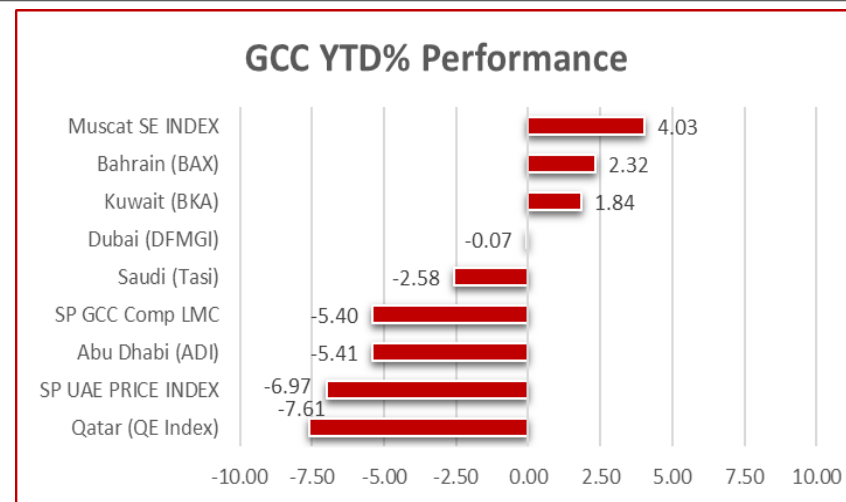
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
19-June-24	24.49%	13.73%	0.06%	2.35%	6.24%	17.72%	13.06%	6.05%	5.59%
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%

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 + 0.09 %The leading sector best performance indices today are Consumer services 3.41 % Technology 2.75 % Energy 1.85 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.36 %, SABIC have positive performance today by + 0.27%, STC have negative performance today by -0.26 %, Al Rajhi Bank flat performance today 0 %.



شركة الاستثمار الوطنية
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