



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 2nd October 2024





Tuesday, October 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)	12,253.5	0.22	-0.98	0.22	0.22	2.39	3.10	23.57	3.35	10,133.19
Qatar (QE Index)	10,629.9	0.15	0.46	0.15	0.15	-1.85	1.24	12.04	4.23	536.48
Dubai (DFMGI)	4,477.3	-0.58	-0.97	-0.58	-0.58	10.28	1.58	8.81	5.33	678.28
Abu Dhabi (ADI)	9,405.7	-0.21	-0.67	-0.21	-0.21	-1.80	2.72	17.01	2.04	2,618.14
Bahrain (BAX)	2,008.6	-0.21	-0.26	-0.21	-0.21	1.88	0.91	10.46	4.55	7.78
Muscat SE INDEX	4,696.5	-0.29	-0.12	-0.29	-0.29	4.04	0.83	9.95	5.83	7.28
SP GCC Comp LMC	185.8	0.09	-0.96	0.09	0.09	0.45	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.4	-0.37	-0.74	-0.37	-0.37	2.61				
Developed Markets										
MSCI World Index	3,693.5	-0.79	-0.89	-0.79	-0.79	16.54				
U.S. (S&P 500)	5,708.8	-0.93	-0.51	-0.93	-0.93	19.68	4.77	27.52	1.55	51,230.95
U.K. (FTSE 100)	8,276.7	0.48	-0.53	0.48	0.48	7.03	1.76	15.03	3.70	2,154.22
Japan (topix)	2,690.8	1.69	-1.83	1.69	1.69	13.71	1.40	14.64	2.16	947,536.36
Emerging Markets										
MSCI EM Index	1,172.6	0.15	-0.16	0.15	0.15	14.54				
China (SSE Composite)	3,336.5	8.06	8.06	17.39	12.44	12.15	1.36	12.00		44,025.04
India (Sensex)	84,266.3	-0.04	-1.53	-0.04	-0.04	16.65	4.50	24.43	1.08	167,424.36
Kuwait										
Kuwait All Share Index	7,156.7	0.29	-0.56	0.29	0.29	4.98	1.46	15.35	3.72	42.95
Kuwait Premier Index	7,724.7	0.21	-0.84	0.21	0.21	3.31	1.57	16.50	3.51	35.24
Kuwait Main Index	6,317.7	0.65	0.73	0.65	0.65	13.43	1.11	11.31	4.77	7.72
Kuwait Sector										
Banking	1,755.2	0.11	-0.85	0.11	0.11	6.54	1.74	17.35	3.12	26.25
Telecom	1,030.0	0.18	-1.42	0.18	0.18	-6.80	1.51	12.41	8.18	3.14
Industrials	727.9	0.32	-0.32	0.32	0.32	-19.82	0.77	11.25	5.95	2.45
Financial Services	1,419.2	0.60	-0.37	0.60	0.60	17.07	1.16	12.61	2.92	4.72
Real Estate	1,390.4	1.07	-0.02	1.07	1.07	14.63	1.06	15.03	2.06	2.92
Basic Materials	808.3	0.12	-0.33	0.12	0.12	8.35	1.45	13.95	10.85	0.46
Health Care	470.7	0.00	-0.33	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,021.3	1.74	2.26	1.74	1.74	55.08	2.18	20.70	2.05	0.30
Insurance	2,082.1	-0.08	4.69	-0.08	-0.08	-9.19	1.14	11.34	3.81	0.84
Consumer Discretionary	1,816.3	0.56	0.63	0.56	0.56	13.24				
Energy	1,156.7	3.50	3.67	3.50	3.50	21.88	0.95	9.50	5.67	0.23
Technology	1,447.7	0.00	-1.00	0.00	0.00	150.31	1.68	603.03		0.02
Utilities	389.5	0.00	-1.99	0.00	0.00	-14.45				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Wednesday on fears conflict in the Middle East could turn into a wider war and disrupt oil supply from the key producing region after Iran fired ballistic missiles at Israel. Brent futures rose 83 cents, or 1.13%, to \$74.39 a barrel.

Kuwait Market

The market closed up by +0.29% at 7,156.7 value traded 77.6 million KD, Premier market value reached 29.3 million KD up by +0.21% at 7,724.7.

KSA Market

The market closed up by +0.22% at 12,253.5.

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	0.881	-0.23	-0.90	-0.23	-0.23	3.47	1.70	13.32	3.84	7.33
KFH	0.718	0.28	-0.69	0.28	0.28	7.80	2.09	20.18	2.67	12.27
ZAIN	0.474	-0.21	-1.25	-0.21	-0.21	-6.51	1.81	11.21	7.38	2.05
BOUBYAN BANK	0.571	0.18	-0.87	0.18	0.18	0.88	2.38	29.27	1.32	2.40
AGILITY	0.220	0.46	-3.93	0.46	0.46	-22.32	0.67	7.41	9.09	0.59
Saudi Arabia										
ARAMCO	27.20	0.37	-1.45	0.37	0.37	-17.58	4.43	15.32	6.98	6,582.93
SABIC	76.10	1.60	1.60	1.60	1.60	-8.86	1.37	116.86	4.34	228.32
STC	43.85	0.34	-0.57	0.34	0.34	11.45	2.88	16.01	3.65	219.27
AL-RAJHI BANK	87.40	0.23	-2.46	0.23	0.23	1.04	3.08	21.60	2.75	349.63
NCB	34.60	0.87	-2.95	0.87	0.87	-10.48	1.18	10.90	5.20	207.62
Abu Dhabi										
ETISALAT.AD	18.44	-0.32	-1.71	-0.32	-0.32	-6.11	3.76	14.85	4.42	160.89
FAB.AD	13.78	0.29	-0.14	0.29	0.29	-1.29	1.25	9.67	5.15	151.79
EMIRATES NBD	20.20	-0.49	-2.65	-0.49	-0.49	16.76	1.13	5.86	5.94	127.60
DB ISLAMIC DB	6.33	0.48	-0.47	0.48	0.48	10.66	1.04	6.99	7.11	45.83
EMAR.DU	8.61	-1.26	-1.03	-1.26	-1.26	8.71	0.99	6.40	5.81	76.10
Qatar										
QNB	17.000	0.29	0.65	0.29	0.29	2.84	1.43	10.46	3.85	157.02
INDUSTREIS QAT	13.020	-0.15	0.23	-0.15	-0.15	-0.46	2.09	15.08	5.38	78.77
QA ISLAMIC BK	21.250	-0.47	2.51	-0.47	-0.47	-1.16	1.65	11.67	2.88	50.21
MASRAF AL RAYA	2.478	0.32	0.57	0.32	0.32	-6.67	0.94	16.02	4.04	23.05
MESAIEED PETRO	1.634	0.25	-1.15	0.25	0.25	-8.61	1.27	23.17	4.28	20.53
Oman										
BANK MUSCAT	0.252	0.00	-1.95	0.00	0.00	-4.55	0.82	9.79	6.15	1.89
OMANTEL	0.985	-0.20	0.51	-0.20	-0.20	-7.08	1.18	11.46	6.09	0.74
BANK DHOFAR	0.157	0.00	0.00	0.00	0.00	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.290	0.00	0.00	0.00	0.00	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.352	0.00	0.00	0.00	0.00	-10.95	0.78	8.49	5.68	0.24

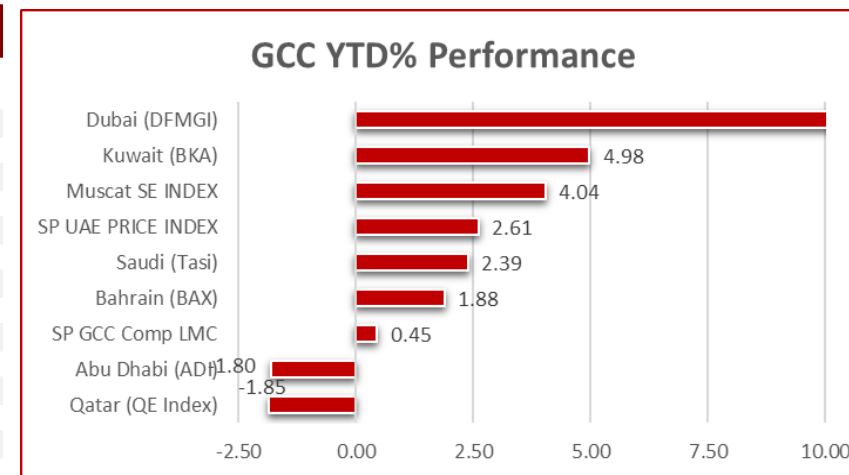
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%
25-Sept. 24	24.33%	15.45%	0.06%	3.67%	7.93%	17.59%	13.03%	5.98%	5.79%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.29 % The leading sector best performance indices today are Energy 3.5 % Consumer services 1.74 % Real estate 1.07 % respectively

KSA

Saudi Armco has a positive performance today by + 0.37 %, SABIC have positive performance today by + 1.6%, STC has a positive performance today by + 0.34 %, Al Rajhi Bank has a positive performance today by + 0.23 %.



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