

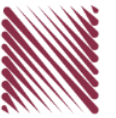


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 20th August 2024



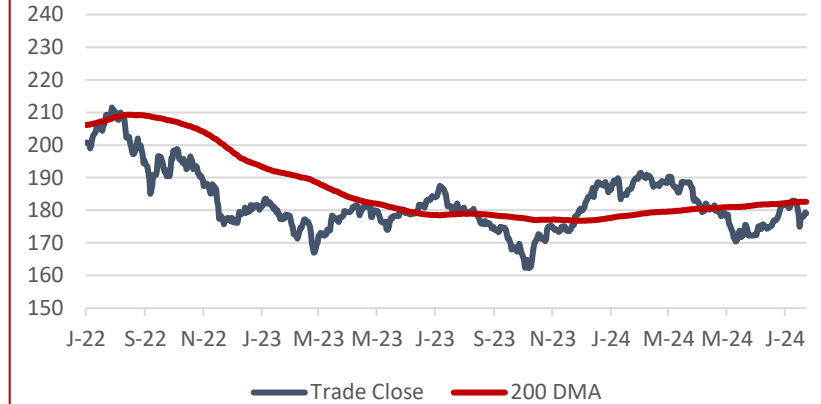


Tuesday, August 20, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,103.8	0.67	1.58	-0.05	3.63	1.14	3.06	23.38	3.25	10,256.77
Qatar (QE Index)	10,158.6	0.03	0.33	0.04	1.92	-6.21	1.18	11.47	4.41	515.32
Dubai (DFMGI)	4,254.9	0.41	0.28	-0.31	5.58	4.80	1.48	8.26	5.69	643.62
Abu Dhabi (ADI)	9,316.8	0.12	0.33	-0.24	2.83	-2.73	2.69	13.32	2.07	2,569.17
Bahrain (BAX)	1,935.9	0.00	-0.08	-1.73	-4.42	-1.81	0.86	9.85	4.80	7.48
Muscat SE INDEX	4,693.1	0.42	0.00	0.67	0.12	3.97	0.83	9.99	5.80	7.31
SP GCC Comp LMC	181.8	0.63	0.94	-0.60	3.90	-1.68	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.2	0.25	0.11	-0.18	5.93	-1.88				
Developed Markets										
MSCI World Index	3,615.8	-0.07	0.88	1.24	2.96	14.09				
U.S. (S&P 500)	5,597.1	-0.20	0.77	1.35	2.50	17.34	4.64	26.80	1.57	49,624.15
U.K. (FTSE 100)	8,273.3	-1.00	-0.46	-1.13	1.34	6.98	1.76	14.95	3.69	2,151.64
Japan (topix)	2,670.5	1.11	-0.30	-4.43	-4.95	12.85	1.39	14.56	2.17	940,195.26
Emerging Markets										
MSCI EM Index	1,104.5	0.08	0.99	1.81	1.68	7.88				
China (SSE Composite)	2,866.7	-0.93	-0.44	-2.45	-3.39	-3.64	1.36	12.00		44,025.04
India (Sensex)	80,802.9	0.47	0.46	-1.15	2.24	11.85	4.35	23.58	1.13	160,750.42
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,117.7	-0.13	0.14	-1.68	2.60	4.41	1.45	15.39	3.65	42.90
Kuwait Premier Index	7,748.2	-0.11	0.20	-1.91	2.71	3.63	1.58	16.66	3.47	35.46
Kuwait Main Index	6,035.8	-0.24	-0.14	-0.54	2.09	8.37	1.05	11.00	4.50	7.44
Kuwait Sector										
Banking	1,762.4	-0.13	-0.09	-2.33	2.94	6.97	1.75	17.46	3.07	26.42
Telecom	990.1	0.39	0.50	-0.23	0.65	-10.41	1.44	11.90	8.52	3.01
Industrials	772.7	0.90	1.99	-1.57	0.01	-14.90	0.82	11.82	5.64	2.59
Financial Services	1,381.1	0.42	1.26	1.22	5.33	13.93	1.10	12.57	2.94	4.60
Real Estate	1,326.8	-0.57	0.28	-0.49	2.41	9.39	1.03	14.91	2.05	2.82
Basic Materials	770.1	0.48	2.13	2.68	1.94	3.25	1.38	13.24	11.43	0.43
Health Care	473.5	1.27	1.27	1.18	7.22	-1.79	1.56	14.28	2.24	
Consumer Staples	997.6	-2.71	0.03	1.53	21.02	51.48	2.23	21.14	2.00	0.31
Insurance	2,084.9	-4.98	-8.58	-12.17	-17.26	-9.07	1.20	11.97	3.62	0.89
Consumer Discretionary	1,711.7	-1.16	1.76	1.07	11.15	6.72				
Energy	1,056.5	-0.07	-0.82	-1.55	2.55	11.33	0.90	9.12	6.30	0.22
Technology	1,695.1	3.10	2.64	4.02	6.88	193.08	1.91	684.85		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 slipped on Wednesday on estimates showing swelling U.S. crude inventories and expectations that tensions in the Middle East were easing following a tour of the region by mediators. Brent crude futures fell 9 cents to \$77.11 a barrel.

Kuwait Market

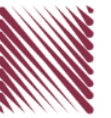
The market closed down by -0.13% at 7,117.7 value traded 44.5 million KD, Premier market value reached 27.8 million KD down by -0.11% at 7,748.2.

KSA Market

The market closed up by +0.67% at 12,103.8.

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	0.875	-0.91	-1.35	-3.31	2.22	2.77	1.67	13.11	3.86	7.32
KFH	0.718	0.14	0.28	-2.58	1.84	7.80	2.07	20.04	2.67	12.34
ZAIN	0.455	0.66	0.44	0.00	2.02	-10.26	1.71	10.63	7.69	1.98
BOUBYAN BANK	0.587	0.00	-0.17	-0.84	4.08	3.70	2.42	29.83	1.29	2.48
AGILITY	0.263	1.15	3.54	-4.01	-5.73	-7.14	0.77	8.51	7.60	0.71
Saudi Arabia										
ARAMCO	28.20	-0.53	0.00	2.17	1.08	-14.55	4.52	15.65	6.74	6,821.31
SABIC	74.40	0.27	-0.27	-5.58	0.81	-10.90	1.36	116.08	4.44	223.10
STC	39.20	0.51	0.26	1.82	2.89	-0.37	2.56	14.24	4.08	195.91
AL-RAJHI BANK	86.50	2.73	3.22	1.05	8.13	0.00	2.97	20.86	2.77	345.84
NCB	35.75	2.00	2.58	-5.92	-1.38	-7.50	1.19	10.93	5.03	214.40
Abu Dhabi										
ETISALAT.AD	17.42	1.75	3.81	6.35	8.20	-11.30	3.45	13.66	4.68	151.49
FAB.AD	13.24	0.15	-1.19	1.53	6.26	-5.16	1.19	9.17	5.36	146.27
EMIRATES NBD	19.75	0.77	-0.25	3.40	19.70	14.16	1.07	5.54	6.08	124.75
DB ISLAMIC DB	5.90	0.00	-0.17	0.85	2.79	3.15	0.96	6.47	7.63	42.72
EMAR.DU	8.15	0.49	0.00	-5.56	-0.61	2.90	0.93	5.99	6.13	72.03
Qatar										
QNB	15.690	0.00	-0.70	2.62	7.10	-5.08	1.33	9.71	4.17	144.90
INDUSTREIS QAT	13.140	-0.45	0.69	0.38	2.02	0.46	2.12	15.25	5.33	79.49
QA ISLAMIC BK	19.420	0.36	0.52	-1.42	4.41	-9.67	1.54	10.94	3.15	45.88
MASRAF AL RAYA	2.243	0.63	0.81	-3.73	-3.69	-15.52	0.85	14.59	4.46	20.86
MESAIEED PETRO	1.654	-0.24	2.10	-1.14	0.55	-7.49	1.27	23.19	4.23	20.78
Oman										
BANK MUSCAT	0.259	1.17	1.57	2.78	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.999	0.40	-0.10	-0.10	-1.58	-5.75	1.21	11.68	6.01	0.75
BANK DHOFA	0.160	0.00	0.00	3.90	-3.03	0.00	0.66	15.11	4.84	0.48
NAT BANK OF OMAN	0.274	-0.36	-0.36	3.40	8.30	-2.14	0.65	9.51	3.10	0.45
OMINVEST	0.335	0.00	0.00	-1.47	-5.63	-15.25	0.74	8.08	5.97	0.22

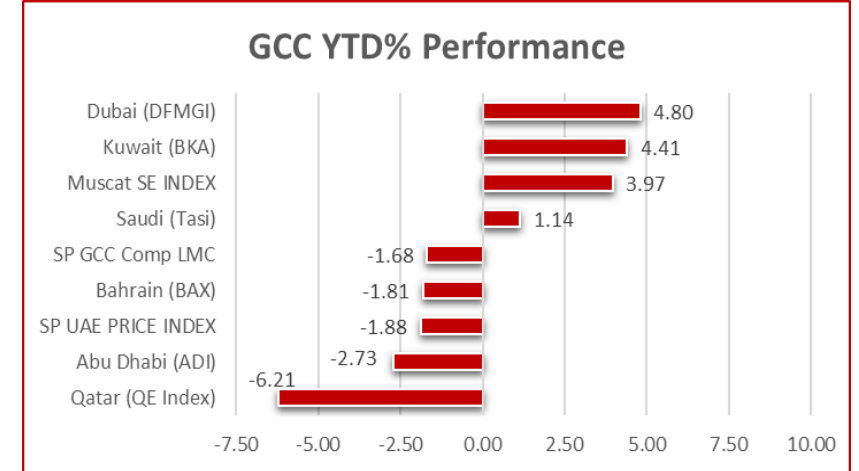
* GCC Markets performance at the latest close.

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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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.13 %The leading sector bottom performance indices today are Insurance -4.98 % Consumer services -2.71 % Consumer Disc -1.16 % respectively.

KSA

Saudi Armco have negative performance today by -0.53 %, SABIC have positive performance today by + 0.26%, STC has a positive performance today by + 0.51 %, Al Rajhi Bank has a positive performance today by + 2.73 %.



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