



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 20th June 2024





Thursday, June 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)	11,498.9	-1.31	-0.53	-0.04	-7.28	-3.91		21.64	3.34	9,948.17
Qatar (QE Index)	9,702.2	0.16	0.36	4.11	-1.47	-10.42	1.12	11.07	4.88	488.29
Dubai (DFMGI)	4,012.2	0.64	0.71	0.86	-5.51	-1.17	1.39	8.18	6.01	592.43
Abu Dhabi (ADI)	9,013.1	0.71	0.90	1.70	-2.33	-5.90	2.60	16.14	2.13	2,514.58
Bahrain (BAX)	2,041.7	0.08	0.04	0.13	-0.05	3.56	0.88	11.08	4.26	8.05
Muscat SE INDEX	4,679.4	-0.45	-1.93	-3.43	0.94	3.66	0.80	10.01	5.86	6.45
SP GCC Comp LMC	172.4	-0.11	0.09	1.08	-6.99	-6.77	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.6	-0.46	0.52	1.29	-6.69	-8.85				
Developed Markets										
MSCI World Index	3,507.8	-0.34	0.45	1.82	2.04	10.69				
U.S. (S&P 500)	5,464.6	-0.16	0.61	3.55	4.00	14.57	4.53	26.73	1.61	48,308.05
U.K. (FTSE 100)	8,237.7	-0.42	1.12	-0.46	3.58	6.52	1.74	14.77	3.70	2,151.22
Japan (topix)	2,724.7	-0.03	-0.80	-1.72	-1.59	15.14	1.42	15.10	2.12	959,464.50
Emerging Markets										
MSCI EM Index	1,086.9	-0.81	0.93	3.62	4.19	6.17				
China (SSE Composite)	2,998.1	-0.24	-1.14	-2.87	-1.41	0.78	1.36	12.00		44,025.04
India (Sensex)	77,209.9	-0.35	0.28	4.39	4.83	6.88	4.87	22.79	1.15	151,514.54
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,038.5	0.46	0.07	-0.19	-3.94	3.24	1.44	15.08	3.65	42.33
Kuwait Premier Index	7,653.6	0.41	-0.02	-0.38	-4.77	2.36	1.56	16.45	3.46	35.00
Kuwait Main Index	6,000.8	0.70	0.49	0.72	0.25	7.74	1.04	10.40	4.53	7.33
Kuwait Sector										
Banking	1,732.8	0.36	-0.13	-0.50	-2.19	5.18	1.72	17.20	3.06	25.95
Telecom	997.0	1.08	1.40	0.00	-6.39	-9.78	1.46	11.89	8.43	3.05
Industrials	783.2	0.18	-0.19	5.61	-25.08	-13.74	0.83	11.70	5.51	2.65
Financial Services	1,331.1	-0.06	-0.14	-2.15	-1.66	9.81	1.08	11.94	3.02	4.40
Real Estate	1,327.9	1.89	1.15	0.11	2.49	9.48	1.02	14.24	2.02	2.82
Basic Materials	820.3	-0.09	-1.06	-2.38	3.84	9.96	1.48	14.38	10.68	0.46
Health Care	441.6	0.00	-0.10	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	876.5	-1.16	0.71	-0.04	13.43	33.08	1.90	19.45	2.34	0.27
Insurance	2,562.7	0.71	0.32	2.08	-0.18	11.77	1.40	12.63	3.10	1.03
Consumer Discretionary	1,556.1	0.48	-0.37	-0.78	-11.17	-2.98				
Energy	1,053.8	0.30	1.56	-1.41	1.04	11.04	0.91	9.88	6.43	0.21
Technology	1,702.4	1.30	1.74	0.00	-10.69	194.34	2.10			0.02
Utilities	423.7	1.26	0.62	1.26	-4.74	-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 on Friday posted a second weekly gain in a row, as gasoline demand has surged to post-pandemic highs. Oil prices fell Friday but were ahead nearly 2.9% for the week. The oil rally has lifted the energy stocks, with the sector up 2.4% to lead the S&P 500 this week. Brent August contract: \$85.24 per barrel, down 47 cents, or 0.55%.

Kuwait Market

The market closed up by + 0.46% at 7,038.5 value traded 80.0 million KD, Premier market value reached 72.7 million KD up by + 0.41% at 7,653.6.

KSA Market

The market is closed.

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	0.860	0.94	0.58	0.35	-4.95	1.01	1.69	12.99	3.88	7.17
KFH	0.714	0.00	-0.83	-2.19	-2.23	7.20	2.09	21.01	2.57	12.23
ZAIN	0.454	0.89	1.57	1.34	-7.91	-10.45	1.58	10.31	7.71	1.97
BOUBAYAN BANK	0.568	0.71	-1.39	-1.90	-2.58	0.35	2.39	30.31	1.33	2.39
AGILITY	0.286	-0.69	-2.39	-2.39	-21.41	0.98	0.77	8.40	6.99	0.77
Saudi Arabia										
ARAMCO	27.70	-2.12	-2.12	-4.48	-10.21	-16.06	4.40	15.28	6.76	6,702.33
SABIC	73.50	-0.68	-1.34	-3.29	-6.13	-11.98	1.32	192.80	4.49	220.46
STC	36.60	-0.54	0.69	1.67	-5.10	-6.98	2.27	13.58	4.37	182.97
AL-RAJHI BANK	79.00	-1.00	0.13	3.81	-4.01	-8.67	2.92	19.69	2.91	315.95
NCB	35.15	0.14	-0.85	3.84	-12.56	-9.06	1.16	10.85	4.98	210.87
Abu Dhabi										
ETISALAT.AD	16.04	-1.12	-0.25	-1.49	-13.62	-19.25	3.17	13.20	5.04	137.91
FAB.AD	11.94	-1.17	1.90	1.72	-10.74	-15.47	1.09	8.20	6.02	130.34
EMIRATES NBD	16.40	-0.61	0.92	5.47	-6.29	-5.20	0.96	4.78	7.32	103.58
DB ISLAMIC DB	5.76	0.70	3.04	4.35	-1.20	0.70	0.97	6.42	7.81	41.70
EMAR.DU	7.90	0.89	1.94	3.13	-3.30	-0.25	0.88	6.16	6.33	69.82
Qatar										
QNB	14.200	0.00	0.14	5.19	-0.21	-14.10	1.26	8.97	4.58	131.16
INDUSTREIS QAT	12.400	1.39	1.81	7.36	3.77	-5.20	2.05	15.52	6.29	75.02
QA ISLAMIC BK	17.850	0.34	0.39	3.78	-2.72	-16.98	1.47	10.20	4.06	42.18
MASRAF AL RAYA	2.321	-0.98	-1.44	0.78	0.04	-12.58	0.90	15.13	4.31	21.59
MESAIEED PETRO	1.680	-1.18	-1.64	-2.33	-15.32	-6.04	1.30	20.94	5.12	21.11
Oman										
BANK MUSCAT	0.251	0.40	-0.79	-3.09	-4.20	-4.92	0.82	9.79	6.18	1.88
OMANTEL	1.016	-2.31	-3.70	-3.88	-1.36	-4.15	1.24	11.47	5.91	0.76
BANK DHOFAR	0.153	0.00	0.00	-2.55	-4.38	-4.38	0.64	15.18	5.07	0.46
NAT BANK OF OMAN	0.257	0.00	-6.88	-8.21	-1.15	-8.21	0.62	9.00	3.31	0.42
OMINVEST	0.365	-3.69	-3.95	-5.19	-0.56	-7.66	0.77	7.93	5.48	0.24

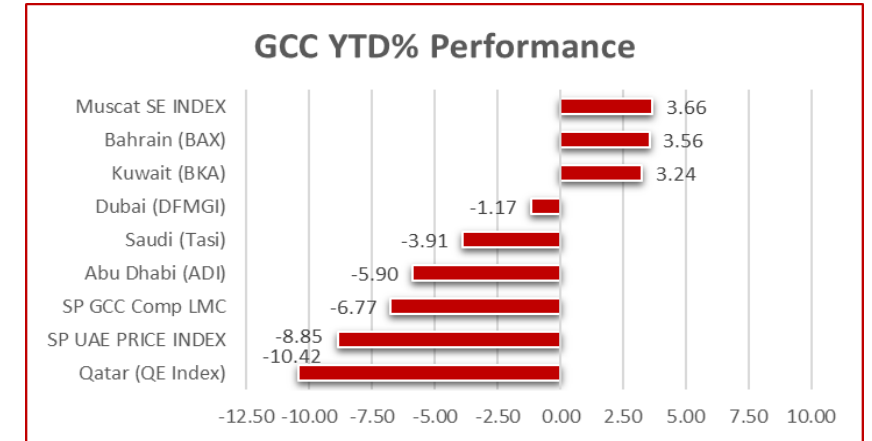
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
12-June-24	24.49%	13.84%	0.06%	2.36%	6.10%	17.72%	13.07%	6.07%	5.60%
19-June-24	24.49%	13.73%	0.06%	2.35%	6.24%	17.72%	13.06%	6.05%	5.59%

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 + 0.46 %The leading sector best performance indices today are Real estate 1.89 % Technology 1.3 % Utilities 1.26 % respectively.

KSA

The market is closed.



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