



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 21st August 2024





Wednesday, August 21, 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)	12,187.4	0.69	2.29	0.64	4.35	1.84	3.15	24.02	3.22	10,177.75
Qatar (QE Index)	10,119.1	-0.39	-0.06	-0.34	1.52	-6.57	1.18	11.42	4.43	512.76
Dubai (DFMGI)	4,294.9	0.94	1.22	0.63	6.57	5.79	1.50	8.33	5.64	646.89
Abu Dhabi (ADI)	9,347.6	0.33	0.66	0.09	3.17	-2.40	2.70	13.36	2.07	2,578.66
Bahrain (BAX)	1,936.7	0.04	-0.03	-1.68	-4.38	-1.76	0.86	9.87	4.80	7.48
Muscat SE INDEX	4,679.9	-0.28	-0.28	0.39	-0.16	3.67	0.83	9.97	5.82	7.29
SP GCC Comp LMC	183.3	0.78	1.73	0.18	4.72	-0.91	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.9	0.47	0.59	0.30	6.44	-1.41				
Developed Markets										
MSCI World Index	3,630.7	0.41	1.30	1.65	3.39	14.56				
U.S. (S&P 500)	5,620.9	0.42	1.20	1.78	2.94	17.84	4.63	26.75	1.57	49,536.73
U.K. (FTSE 100)	8,283.4	0.12	-0.34	-1.01	1.46	7.11	1.76	14.97	3.69	2,153.84
Japan (topix)	2,664.9	-0.21	-0.51	-4.63	-5.15	12.61	1.39	14.53	2.18	938,177.02
Emerging Markets										
MSCI EM Index	1,100.9	-0.32	0.66	1.49	1.35	7.54				
China (SSE Composite)	2,856.6	-0.35	-0.79	-2.80	-3.73	-3.98	1.36	12.00		44,025.04
India (Sensex)	80,905.3	0.13	0.58	-1.02	2.37	11.99	4.35	23.61	1.13	161,125.46
Kuwait										
Kuwait All Share Index	7,143.3	0.36	0.50	-1.33	2.97	4.78	1.46	15.36	3.65	42.84
Kuwait Premier Index	7,769.3	0.27	0.47	-1.65	2.99	3.91	1.58	16.62	3.47	35.42
Kuwait Main Index	6,083.0	0.78	0.64	0.24	2.89	9.22	1.06	10.97	4.50	7.42
Kuwait Sector										
Banking	1,768.8	0.36	0.27	-1.97	3.31	7.36	1.75	17.44	3.08	26.39
Telecom	990.2	0.01	0.51	-0.22	0.66	-10.41	1.45	11.95	8.49	3.03
Industrials	773.3	0.08	2.08	-1.48	0.09	-14.82	0.82	11.89	5.59	2.61
Financial Services	1,386.1	0.36	1.63	1.59	5.71	14.35	1.13	12.52	2.86	4.62
Real Estate	1,335.1	0.62	0.91	0.13	3.05	10.07	1.02	14.70	2.06	2.81
Basic Materials	778.2	1.05	3.20	3.76	3.00	4.33	1.39	13.31	11.37	0.43
Health Care	473.5	0.00	1.27	1.18	7.22	-1.79	1.58		2.21	
Consumer Staples	1,012.0	1.44	1.48	2.99	22.76	53.67	2.16	20.57	2.06	0.30
Insurance	2,105.6	0.99	-7.67	-11.30	-16.44	-8.17	1.14	11.37	3.81	0.84
Consumer Discretionary	1,718.4	0.39	2.15	1.46	11.58	7.14				
Energy	1,052.4	-0.39	-1.21	-1.93	2.15	10.89	0.90	9.08	6.30	0.21
Technology	1,695.1	0.00	2.64	4.02	6.88	193.08	1.97	706.06		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

A sharp sell-off in crude oil paused on Thursday after expectations of a rate cut by the Federal Reserve offset a bunch of weak economic data from the world's two largest economies, the United States and China. Brent crude futures were 3 cents up to \$76.08 a barrel.

Kuwait Market

The market closed up by +0.36% at 7,143.3 value traded 55.3 million KD, Premier market value reached 38.7 million KD up by +0.27% at 7,769.3.

KSA Market

The market closed up by +0.69% at 12,187.4.

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	0.878	0.34	-1.01	-2.98	2.57	3.12	1.68	13.16	3.85	7.35
KFH	0.717	-0.14	0.14	-2.71	1.70	7.65	2.07	20.01	2.67	12.33
ZAIN	0.456	0.22	0.66	0.22	2.24	-10.06	1.72	10.65	7.68	1.98
BOUBYAN BANK	0.589	0.34	0.17	-0.51	4.43	4.06	2.43	29.93	1.28	2.49
AGILITY	0.261	-0.76	2.76	-4.74	-6.45	-7.84	0.76	8.44	7.66	0.70
Saudi Arabia										
ARAMCO	27.75	-1.60	-1.60	0.54	-0.54	-15.91	4.45	15.40	6.85	6,712.64
SABIC	74.50	0.13	-0.13	-5.46	0.95	-10.78	1.36	116.24	4.43	223.40
STC	39.75	1.40	1.66	3.25	4.33	1.03	2.59	14.44	4.03	198.67
AL-RAJHI BANK	89.10	3.01	6.32	4.09	11.38	3.01	3.06	21.48	2.69	356.25
NCB	36.85	3.08	5.74	-3.03	1.66	-4.66	1.22	11.27	4.88	221.01
Abu Dhabi										
ETISALAT.AD	17.32	-0.57	3.22	5.74	7.58	-11.81	3.43	13.58	4.71	150.61
FAB.AD	13.30	0.45	-0.75	1.99	6.74	-4.73	1.19	9.22	5.34	146.91
EMIRATES NBD	19.45	-1.52	-1.77	1.83	17.88	12.43	1.06	5.46	6.17	122.84
DB ISLAMIC DB	6.06	2.71	2.54	3.59	5.57	5.94	0.99	6.64	7.43	43.87
EMAR.DU	8.47	3.93	3.93	-1.85	3.29	6.94	0.97	6.23	5.90	74.85
Qatar										
QNB	15.590	-0.64	-1.33	1.96	6.42	-5.69	1.32	9.65	4.20	143.98
INDUSTREIS QAT	12.900	-1.83	-1.15	-1.45	0.16	-1.38	2.08	14.97	5.43	78.03
QA ISLAMIC BK	19.450	0.15	0.67	-1.27	4.57	-9.53	1.55	10.95	3.15	45.95
MASRAF AL RAYA	2.238	-0.22	0.58	-3.95	-3.91	-15.71	0.85	14.55	4.47	20.81
MESAIED PETRO	1.638	-0.97	1.11	-2.09	-0.43	-8.39	1.25	22.96	4.27	20.58
Oman										
BANK MUSCAT	0.258	-0.39	1.18	2.38	2.79	-2.27	0.82	9.82	6.01	1.94
OMANTEL	1.000	0.10	0.00	0.00	-1.48	-5.66	1.21	11.70	6.00	0.75
BANK DHOFAR	0.158	-1.25	-1.25	2.60	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.274	0.00	-0.36	3.40	8.30	-2.14	0.65	9.51	3.10	0.45
OMINVEST	0.334	-0.30	-0.30	-1.76	-5.92	-15.51	0.74	8.05	5.99	0.22

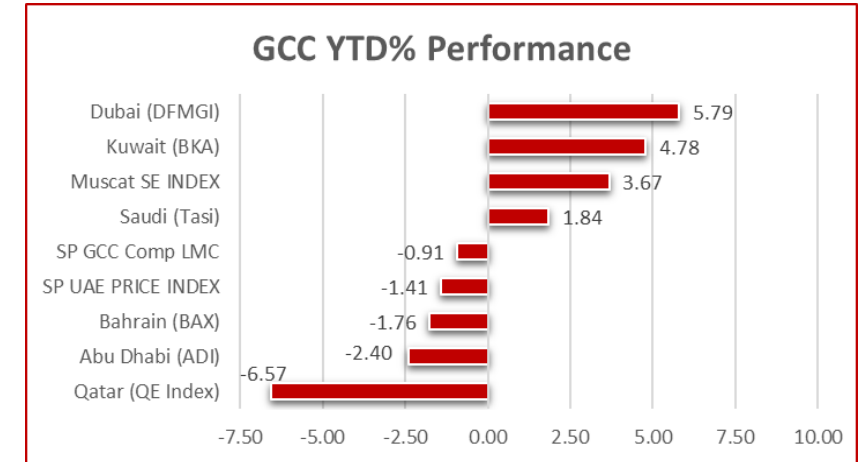
* GCC Markets performance at the latest close.

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 up today by + 0.36 %The leading sector best performance indices today are Consumer services 1.44 % Basic materials 1.05 % Insurance 0.99 % respectively

KSA

Saudi Armco have negative performance today by -1.6 %, SABIC have positive performance today by + 0.13%, STC has a positive performance today by + 1.4 %, Al Rajhi Bank has a positive performance today by + 3.01 %.



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