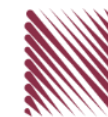


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday , 21st July 2024





Sunday, July 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)	12,202.9	0.12	0.12	4.48	4.48	1.97	3.31	26.21	3.15	10,355.73
Qatar (QE Index)	10,060.2	0.26	0.26	0.93	0.93	-7.11	1.16	11.61	4.66	506.72
Dubai (DFMGI)	4,181.0	0.28	1.88	3.75	3.75	2.98	1.45	8.47	5.77	622.71
Abu Dhabi (ADI)	9,233.7	0.08	0.99	1.91	1.91	-3.59	2.67	16.53	2.08	2,575.39
Bahrain (BAX)	1,960.3	-0.97	-0.97	-3.22	-3.22	-0.57	0.87	11.12	4.55	7.58
Muscat SE INDEX	4,682.8	-0.31	-0.31	-0.10	-0.10	3.74	0.83	10.09	5.85	7.27
SP GCC Comp LMC	181.9	0.09	0.09	3.94	3.94	-1.64	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.6	0.00	0.00	3.87	3.87	-3.79				
Developed Markets										
MSCI World Index	3,553.8	-0.73	-2.03	1.20	1.20	12.14				
U.S. (S&P 500)	5,505.0	-0.71	-1.97	0.82	0.82	15.41	4.59	26.85	1.60	48,848.59
U.K. (FTSE 100)	8,155.7	-0.60	-1.18	-0.10	-0.10	5.46	1.74	14.65	3.74	2,124.95
Japan (topix)	2,860.8	-0.27	-1.17	1.82	1.82	20.89	1.49	15.83	2.02	1,003,963.56
Emerging Markets										
MSCI EM Index	1,089.6	-1.48	-3.02	0.31	0.31	6.43				
China (SSE Composite)	2,982.3	0.17	0.37	0.50	0.50	0.25	1.36	12.00		44,025.04
India (Sensex)	80,604.7	-0.91	0.11	1.99	1.99	11.58	4.95	23.94	1.12	159,694.92
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,072.2	-0.42	-0.42	1.95	1.95	3.74	1.46	15.04	3.69	39.52
Kuwait Premier Index	7,721.1	-0.49	-0.49	2.35	2.35	3.26	1.61	16.62	3.47	32.57
Kuwait Main Index	5,913.1	-0.11	-0.11	0.01	0.01	6.16	1.03	9.98	4.72	6.95
Kuwait Sector										
Banking	1,747.1	-0.47	-0.47	2.05	2.05	6.05	1.74	17.25	3.04	26.29
Telecom	992.3	-0.15	-0.15	0.88	0.88	-10.21	1.46	11.85	8.46	3.04
Industrials	783.6	-0.98	-0.98	1.42	1.42	-13.69	0.84	11.80	5.46	2.68
Financial Services	1,341.5	-0.56	-0.56	2.31	2.31	10.67	1.16	10.87	3.50	3.72
Real Estate	1,366.9	-0.26	-0.26	5.50	5.50	12.70	0.77	11.88	2.29	1.60
Basic Materials	753.9	0.16	0.16	-0.21	-0.21	1.07	1.35	13.20	11.64	0.42
Health Care	468.0	0.00	0.00	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	899.4	0.42	0.42	9.10	9.10	36.57	1.94	19.88	2.29	0.27
Insurance	2,157.4	-0.60	-0.60	-14.38	-14.38	-5.91	1.18	10.64	3.66	0.88
Consumer Discretionary	1,640.6	1.02	1.02	6.54	6.54	2.29				
Energy	1,070.9	0.14	0.14	3.95	3.95	12.85	0.91	9.94	6.29	0.22
Technology	1,644.2	-1.31	-1.31	3.67	3.67	184.28	1.93	275.90		0.02
Utilities	439.5	-0.60	-0.60	4.37	4.37	-3.47				

* 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 in early trade on Monday as investors keep a lookout for signs of a rate-cut cycle expected to begin as soon as September. Brent crude prices were up 48 cents, or 0.57%, at \$83.10 a barrel.

Kuwait Market

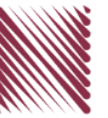
The market closed down by -0.42% at 7,072.2 value traded 26.6 million KD, Premier market value reached 19.2 million KD down by -0.49% at 7,721.1.

KSA Market

The market closed up by +0.12% at 12,202.9.

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	0.868	-0.34	-0.34	1.40	1.40	1.95	1.66	13.01	3.90	7.26
KFH	0.723	-0.28	-0.28	2.55	2.55	8.55	2.12	21.28	2.54	12.43
ZAIN	0.451	0.00	0.00	1.12	1.12	-11.05	1.57	10.24	7.76	1.96
BOUBYAN BANK	0.573	-1.04	-1.04	1.60	1.60	1.23	2.36	29.12	1.32	2.42
AGILITY	0.282	-1.74	-1.74	1.08	1.08	-0.43	0.76	8.28	7.09	0.76
Saudi Arabia										
ARAMCO	28.50	0.18	0.18	2.15	2.15	-13.64	4.53	15.72	6.57	6,896.45
SABIC	79.10	0.00	0.00	7.18	7.18	-5.27	1.42	207.49	4.17	237.28
STC	38.60	-0.26	-0.26	1.31	1.31	-1.90	2.39	14.33	4.15	192.98
AL-RAJHI BANK	84.60	0.71	0.71	5.75	5.75	-2.20	3.13	21.09	2.72	338.37
NCB	38.30	0.00	0.00	5.66	5.66	-0.91	1.27	11.82	4.57	229.78
Abu Dhabi										
ETISALAT.AD	16.28	-0.12	1.75	1.12	1.12	-17.11	3.25	13.55	4.91	141.56
FAB.AD	12.60	0.00	1.45	1.12	1.12	-9.74	1.16	8.75	5.63	139.18
EMIRATES NBD	17.55	0.29	4.15	6.36	6.36	1.45	0.95	4.92	6.84	110.84
DB ISLAMIC DB	5.96	-0.67	3.11	3.83	3.83	4.20	1.01	6.64	7.55	43.15
EMAR.DU	8.35	0.48	3.09	1.83	1.83	5.43	0.93	6.51	5.99	73.79
Qatar										
QNB	14.900	0.81	0.81	1.71	1.71	-9.86	1.26	9.23	4.40	137.60
INDUSTREIS QAT	13.100	1.08	1.08	1.71	1.71	0.15	2.17	16.39	5.95	79.24
QA ISLAMIC BK	19.300	0.78	0.78	3.76	3.76	-10.23	1.53	10.87	3.17	45.60
MASRAF AL RAYA	2.325	0.22	0.22	-0.17	-0.17	-12.43	0.89	15.12	4.30	21.62
MESAIEED PETRO	1.674	-0.77	-0.77	1.76	1.76	-6.38	1.30	20.87	5.14	21.03
Oman										
BANK MUSCAT	0.251	-0.79	-0.79	0.00	0.00	-4.92	0.82	9.79	6.18	1.88
OMANTEL	1.002	0.20	0.20	-1.28	-1.28	-5.47	1.22	11.31	5.99	0.75
BANK DHOFAR	0.160	0.00	0.00	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.260	0.00	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.340	0.00	0.00	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

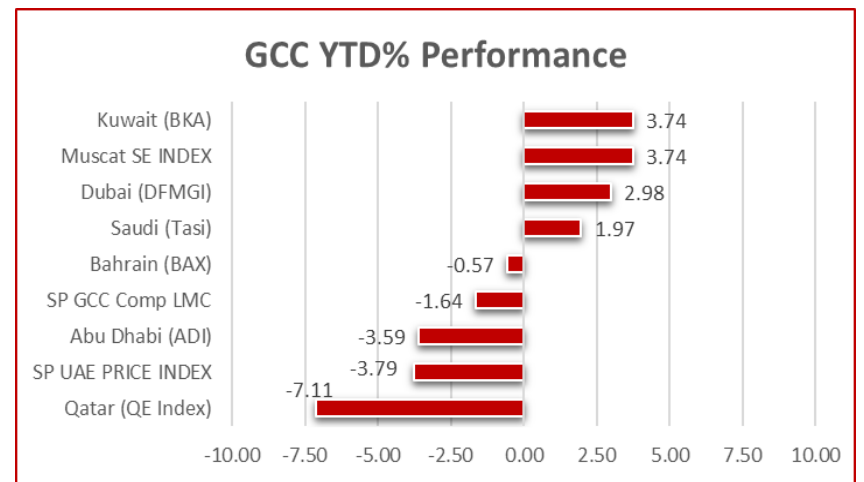
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
10-July-24	24.45%	13.71%	0.06%	2.60%	6.30%	17.63%	12.96%	6.01%	5.60%
17-July-24	24.41%	13.88%	0.06%	2.77%	6.80%	17.61%	12.93%	6.01%	5.66%

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 -0.42 %The leading sector bottom performance indices today are Technology -1.31 % Industrials -0.98 % Insurance -0.6 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC flat performance today 0 %, STC have negative performance today by -0.26 %, Al Rajhi Bank has a positive performance today by + 0.71 %.



شركة الاستثمار الوطنية
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