

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

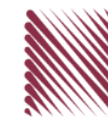
GCC DAILY MORNING BRIEF

Monday, 21st October 2024



DAILY MARKETS WRAP,

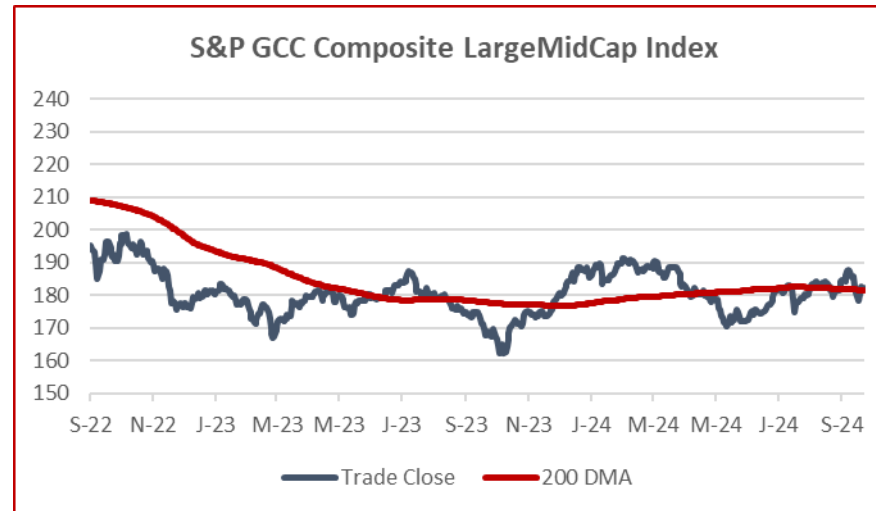
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,882.9	-0.21	-0.21	-2.81	-2.81	-0.71	2.92	22.20	3.47	9,984.64
Qatar (QE Index)	10,615.1	-1.10	-1.10	0.01	0.01	-1.99	1.24	11.95	4.22	538.32
Dubai (DFMGI)	4,469.3	0.24	0.64	-0.76	-0.76	10.09	1.57	8.78	5.35	676.17
Abu Dhabi (ADI)	9,287.7	0.11	0.29	-1.46	-1.46	-3.03	2.70	16.82	2.07	2,628.76
Bahrain (BAX)	1,990.1	-0.49	-0.49	-1.13	-1.13	0.94	0.90	10.35	4.59	7.71
Muscat SE INDEX	4,810.1	0.21	0.21	2.12	2.12	6.56	0.86	10.28	5.70	7.50
SP GCC Comp LMC	181.0	-0.27	-0.27	-2.49	-2.49	-2.14	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.5	0.00	0.00	-2.47	-2.47	0.45				
Developed Markets										
MSCI World Index	3,753.0	0.41	0.57	0.81	0.81	18.42				
U.S. (S&P 500)	5,864.7	0.40	0.85	1.77	1.77	22.95	4.87	28.39	1.52	52,189.40
U.K. (FTSE 100)	8,358.3	-0.32	1.27	1.47	1.47	8.08	1.76	15.26	3.67	2,171.23
Japan (topix)	2,689.0	0.04	-0.64	1.63	1.63	13.63	1.40	14.63	2.16	946,491.48
Emerging Markets										
MSCI EM Index	1,155.1	1.76	-0.38	-1.34	-1.34	12.83				
China (SSE Composite)	3,261.6	2.91	1.36	-2.25	-2.25	9.63	1.36	12.00		44,025.04
India (Sensex)	81,224.8	0.27	-0.19	-3.65	-3.65	12.44	4.34	23.49	1.13	160,743.25

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,049.6	-0.43	-0.43	-1.21	-1.21	3.41	1.45	15.10	3.98	42.63
Kuwait Premier Index	7,546.3	-0.40	-0.40	-2.11	-2.11	0.93	1.55	16.06	3.84	34.64
Kuwait Main Index	6,459.8	-0.57	-0.57	2.92	2.92	15.98	1.14	11.69	4.63	7.99
Kuwait Sector										
Banking	1,724.8	-0.50	-0.50	-1.62	-1.62	4.70	1.72	16.97	3.16	25.97
Telecom	1,002.7	-0.40	-0.40	-2.48	-2.48	-9.27	1.47	12.15	8.35	3.08
Industrials	684.0	-0.14	-0.14	-5.73	-5.73	-24.66	0.73	10.62	10.32	2.32
Financial Services	1,419.4	-0.70	-0.70	0.62	0.62	17.09	1.17	12.71	2.87	4.78
Real Estate	1,394.4	-0.31	-0.31	1.37	1.37	14.96	1.07	15.27	2.05	2.97
Basic Materials	822.7	-0.21	-0.21	1.91	1.91	10.29	1.48	12.51	10.62	0.47
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,012.4	-1.92	-1.92	0.85	0.85	53.72	2.24	21.29	1.99	0.31
Insurance	2,041.9	1.12	1.12	-2.01	-2.01	-10.94	1.10	11.00	3.93	0.82
Consumer Discretionary	1,896.4	-0.12	-0.12	4.99	4.99	18.23				
Energy	1,135.0	1.96	1.96	1.56	1.56	19.60	0.95	9.48	5.69	0.23
Technology	1,047.6	0.70	0.70	-27.64	-27.64	81.13	1.21	433.33		0.01
Utilities	386.8	0.00	0.00	-0.68	-0.68	-15.03				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

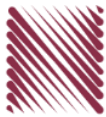
Oil prices steadied in early trading on Monday, following a more than 7% drop last week on worries about demand in China, the world's top oil importer, and an easing of concerns about potential supply disruptions in the Middle East. Brent crude futures rose 8 cents, or 0.11%, to \$73.14 a barrel.

Kuwait Market

The market down by 0.43% at 7,049.6 value traded 59.9 million KD, Premier market value reached 19.5 million KD down by -0.40% at 7,546.3.

KSA Market

The market closed down by -0.21% at 11,882.9.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.857	-0.46	-0.46	-2.94	-2.94	0.65	1.62	12.70	3.95	7.14
KFH	0.711	-0.56	-0.56	-0.70	-0.70	6.75	2.07	19.96	2.70	12.17
ZAIN	0.452	-0.44	-0.44	-4.84	-4.84	-10.85	1.71	10.61	7.74	1.96
BOUBYAN BANK	0.538	-0.37	-0.37	-5.61	-5.61	-4.95	2.23	27.44	1.40	2.26
AGILITY	0.241	0.84	0.84	10.05	10.05	-14.91	0.70	7.73	8.30	0.65
Saudi Arabia										
ARAMCO	27.05	0.19	0.19	-0.18	-0.18	-18.03	4.33	14.98	7.02	6,546.27
SABIC	72.70	0.28	0.28	-2.94	-2.94	-12.93	1.33	113.12	4.54	218.11
STC	42.20	-0.12	-0.12	-3.43	-3.43	7.25	2.76	15.34	3.79	211.01
AL-RAJHI BANK	82.70	0.36	0.36	-5.16	-5.16	-4.39	2.83	19.87	2.90	330.81
NCB	34.50	-0.72	-0.72	0.58	0.58	-10.74	1.15	10.62	5.22	207.01
Abu Dhabi										
ETISALAT.AD	17.66	0.91	-1.34	-4.54	-4.54	-10.08	3.50	13.85	4.61	153.58
FAB.AD	13.52	0.90	3.21	-1.60	-1.60	-3.15	1.21	9.37	5.25	149.36
EMIRATES NBD	20.00	1.27	1.78	-1.48	-1.48	15.61	1.03	5.61	6.00	126.33
DB ISLAMIC DB	6.19	1.14	1.31	-1.75	-1.75	8.22	1.01	6.78	7.27	44.82
EMAR.DU	8.40	-1.06	-0.59	-3.67	-3.67	6.06	0.96	6.17	5.95	74.25
Qatar										
QNB	17.510	-1.46	-1.46	3.30	3.30	5.93	1.47	10.80	3.74	161.73
INDUSTREIS QAT	13.210	-1.27	-1.27	1.30	1.30	0.99	2.15	15.53	5.30	79.92
QA ISLAMIC BK	21.600	-0.92	-0.92	1.17	1.17	0.47	1.70	11.99	2.84	51.04
MASRAF AL RAYA	2.398	-0.70	-0.70	-2.91	-2.91	-9.68	0.90	15.42	4.17	22.30
MESAIEED PETRO	1.628	-0.67	-0.67	-0.12	-0.12	-8.95	1.26	22.98	4.30	20.45
Oman										
BANK MUSCAT	0.266	-0.75	-0.75	5.56	5.56	0.76	0.85	10.21	5.83	2.00
OMANTEL	0.995	0.51	0.51	0.81	0.81	-6.13	1.20	11.58	6.03	0.75
BANK DHOFAR	0.168	0.00	0.00	7.01	7.01	5.00	0.70	15.86	4.61	0.50
NAT BANK OF OMAN	0.295	0.00	0.00	1.72	1.72	5.36	0.70	10.24	2.88	0.48
OMINVEST	0.364	2.54	2.54	3.41	3.41	-7.92	0.79	8.56	5.49	0.24

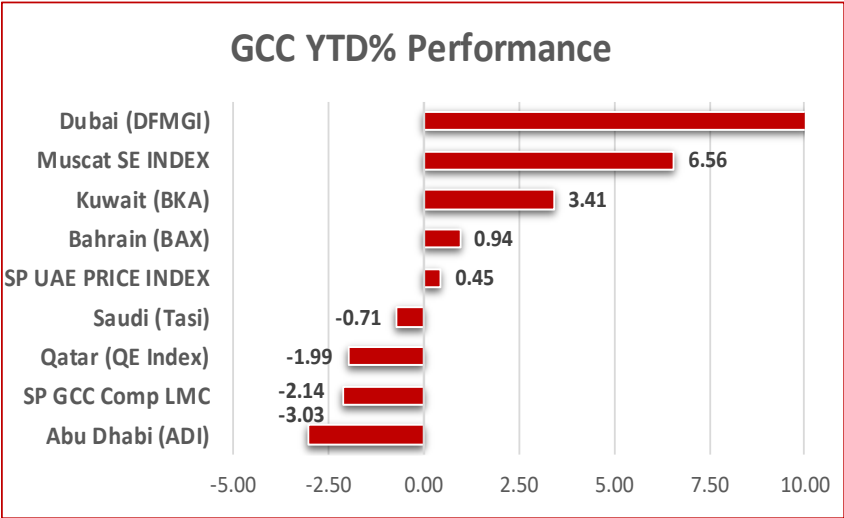
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
09-October. 24	24.73%	15.67%	0.06%	3.73%	7.96%	17.61%	12.99%	6.03%	5.84%
16-October. 24	24.73%	15.75%	0.06%	3.72%	7.91%	17.62%	12.98%	6.18%	5.85%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.43 %The leading sector bottom performance indices today are Consumer services -1.92 % Financial services -0.7 % Banking -0.5 % respectively

KSA

Saudi Armco has a positive performance today by + 0.19 %, SABIC have positive performance today by + 0.27%, STC have negative performance today by -0.12 %, Al Rajhi Bank has a positive performance today by + 0.36 %.



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