

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday , 22<sup>nd</sup> July 2024





Monday, July 22, 2024

| * Market Watch           | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |        |      |        |                |                       |
| Saudi (Tasi)             | 12,174.8    | -0.23 | -0.11 | 4.24  | 4.24  | 1.73   | 3.26 | 25.86  | 3.16           | 10,324.38             |
| Qatar (QE Index)         | 10,120.7    | 0.60  | 0.86  | 1.54  | 1.54  | -6.56  | 1.16 | 11.68  | 4.63           | 509.94                |
| Dubai (DFMGI)            | 4,179.0     | -0.05 | -0.05 | 3.70  | 3.70  | 2.94   | 1.45 | 8.45   | 5.78           | 622.73                |
| Abu Dhabi (ADI)          | 9,278.9     | 0.49  | 0.49  | 2.41  | 2.41  | -3.12  | 2.68 | 16.60  | 2.07           | 2,580.87              |
| Bahrain (BAX)            | 1,979.9     | 1.00  | 0.02  | -2.25 | -2.25 | 0.43   | 0.88 | 11.21  | 4.52           | 7.65                  |
| Muscat SE INDEX          | 4,631.4     | -1.10 | -1.40 | -1.19 | -1.19 | 2.60   | 0.82 | 9.99   | 5.90           | 7.20                  |
| SP GCC Comp LMC          | 181.8       | -0.04 | 0.05  | 3.90  | 3.90  | -1.68  | 1.74 | 14.31  | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 132.9       | 0.25  | 0.25  | 4.13  | 4.13  | -3.55  |      |        |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |        |      |        |                |                       |
| MSCI World Index         | 3,584.7     | 0.87  | 0.87  | 2.08  | 2.08  | 13.11  |      |        |                |                       |
| U.S. (S&P 500)           | 5,564.4     | 1.08  | 1.08  | 1.90  | 1.90  | 16.66  | 4.59 | 26.85  | 1.60           | 48,848.59             |
| U.K. (FTSE 100)          | 8,198.8     | 0.53  | 0.53  | 0.42  | 0.42  | 6.02   | 1.75 | 14.73  | 3.72           | 2,135.59              |
| Japan (topix)            | 2,827.5     | -1.16 | -1.16 | 0.64  | 0.64  | 19.49  | 1.47 | 15.64  | 2.05           | 992,967.54            |
| <b>Emerging Markets</b>  |             |       |       |       |       |        |      |        |                |                       |
| MSCI EM Index            | 1,085.5     | -0.38 | -0.38 | -0.07 | -0.07 | 6.03   |      |        |                |                       |
| China (SSE Composite)    | 2,964.2     | -0.61 | -0.61 | -0.11 | -0.11 | -0.36  | 1.36 | 12.00  |                | 44,025.04             |
| India (Sensex)           | 80,502.1    | -0.13 | -0.13 | 1.86  | 1.86  | 11.44  | 4.95 | 24.02  | 1.12           | 159,230.48            |
|                          |             |       |       |       |       |        |      |        |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |       |        |      |        |                |                       |
| Kuwait All Share Index   | 7,117.6     | 0.64  | 0.22  | 2.60  | 2.60  | 4.41   | 1.45 | 15.09  | 3.64           | 42.56                 |
| Kuwait Premier Index     | 7,756.0     | 0.45  | -0.03 | 2.82  | 2.82  | 3.73   | 1.58 | 16.48  | 3.44           | 35.31                 |
| Kuwait Main Index        | 6,006.2     | 1.58  | 1.47  | 1.59  | 1.59  | 7.84   | 1.04 | 10.30  | 4.58           | 7.26                  |
| <b>Kuwait Sector</b>     |             |       |       |       |       |        |      |        |                |                       |
| Banking                  | 1,756.2     | 0.52  | 0.04  | 2.58  | 2.58  | 6.60   | 1.73 | 17.17  | 3.05           | 26.16                 |
| Telecom                  | 992.9       | 0.07  | -0.08 | 0.94  | 0.94  | -10.15 | 1.45 | 11.83  | 8.47           | 3.03                  |
| Industrials              | 788.7       | 0.65  | -0.34 | 2.08  | 2.08  | -13.13 | 0.84 | 11.67  | 5.51           | 2.65                  |
| Financial Services       | 1,351.2     | 0.72  | 0.16  | 3.04  | 3.04  | 11.46  | 1.09 | 12.04  | 2.96           | 4.47                  |
| Real Estate              | 1,364.7     | -0.16 | -0.43 | 5.33  | 5.33  | 12.51  |      |        | 2.00           | 0.00                  |
| Basic Materials          | 754.6       | 0.09  | 0.24  | -0.12 | -0.12 | 1.16   | 1.36 | 13.22  | 11.62          | 0.43                  |
| Health Care              | 468.0       | 0.00  | 0.00  | 5.97  | 5.97  | -2.93  | 1.56 | 14.30  | 1.84           |                       |
| Consumer Staples         | 906.6       | 0.80  | 1.22  | 9.97  | 9.97  | 37.66  | 1.95 | 19.96  | 2.28           | 0.27                  |
| Insurance                | 2,371.5     | 9.92  | 9.26  | -5.88 | -5.88 | 3.43   | 1.18 | 10.57  | 3.68           | 0.87                  |
| Consumer Discretionary   | 1,644.1     | 0.21  | 1.23  | 6.76  | 6.76  | 2.50   |      |        |                |                       |
| Energy                   | 1,076.7     | 0.54  | 0.68  | 4.51  | 4.51  | 13.45  | 0.91 | 9.96   | 6.29           | 0.22                  |
| Technology               | 1,636.9     | -0.44 | -1.75 | 3.21  | 3.21  | 183.02 | 1.91 | 272.29 |                | 0.02                  |
| Utilities                | 436.8       | -0.60 | -1.19 | 3.75  | 3.75  | -4.05  |      |        |                |                       |

\* 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 for a third trading session on Tuesday as investors focused on the prospect of swelling oil supplies and weak demand, while showing little reaction to U.S. presidential campaign upheaval. Brent crude futures for September fell 9 cents to \$82.31 a barrel.

#### Kuwait Market

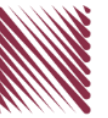
The market closed up by +0.46% at 7,117.6 value traded 35.8 million KD, Premier market value reached 28.4 million KD up by +0.45% at 7,756.0.

#### KSA Market

The market closed down by -0.23% at 12,174.8.

# 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) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |        |      |        |                |                       |
| NBK                    | 0.872       | 0.46  | 0.11  | 1.87  | 1.87  | 2.42   | 1.67 | 13.07  | 3.88           | 7.30                  |
| KFH                    | 0.727       | 0.55  | 0.28  | 3.12  | 3.12  | 9.15   | 2.13 | 21.39  | 2.52           | 12.50                 |
| ZAIN                   | 0.451       | 0.00  | 0.00  | 1.12  | 1.12  | -11.05 | 1.57 | 10.24  | 7.76           | 1.96                  |
| BOUBYAN BANK           | 0.574       | 0.17  | -0.86 | 1.77  | 1.77  | 1.41   | 2.37 | 29.17  | 1.31           | 2.42                  |
| AGILITY                | 0.284       | 0.71  | -1.05 | 1.79  | 1.79  | 0.28   | 0.76 | 8.34   | 7.04           | 0.76                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |        |      |        |                |                       |
| ARAMCO                 | 28.40       | -0.35 | -0.18 | 1.79  | 1.79  | -13.94 | 4.51 | 15.66  | 6.60           | 6,872.25              |
| SABIC                  | 78.50       | -0.76 | -0.76 | 6.37  | 6.37  | -5.99  | 1.41 | 205.91 | 4.20           | 235.48                |
| STC                    | 39.00       | 1.04  | 0.78  | 2.36  | 2.36  | -0.88  | 2.42 | 14.47  | 4.10           | 194.98                |
| AL-RAJHI BANK          | 84.30       | -0.35 | 0.36  | 5.38  | 5.38  | -2.54  | 3.11 | 21.01  | 2.73           | 337.17                |
| NCB                    | 37.90       | -1.04 | -1.04 | 4.55  | 4.55  | -1.94  | 1.25 | 11.70  | 4.62           | 227.38                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |        |      |        |                |                       |
| ETISALAT.AD            | 16.50       | 1.35  | 1.35  | 2.48  | 2.48  | -15.99 | 3.29 | 13.74  | 4.85           | 143.47                |
| FAB.AD                 | 12.62       | 0.16  | 0.16  | 1.28  | 1.28  | -9.60  | 1.17 | 8.77   | 5.63           | 139.40                |
| EMIRATES NBD           | 17.50       | -0.28 | -0.28 | 6.06  | 6.06  | 1.16   | 0.95 | 4.91   | 6.86           | 110.52                |
| DB ISLAMIC DB          | 5.94        | -0.34 | -0.34 | 3.48  | 3.48  | 3.85   | 1.00 | 6.62   | 7.58           | 43.00                 |
| EMAR.DU                | 8.32        | -0.36 | -0.36 | 1.46  | 1.46  | 5.05   | 0.93 | 6.48   | 6.01           | 73.53                 |
| <b>Qatar</b>           |             |       |       |       |       |        |      |        |                |                       |
| QNB                    | 15.050      | 1.01  | 1.83  | 2.73  | 2.73  | -8.95  | 1.28 | 9.32   | 4.35           | 138.98                |
| INDUSTREIS QAT         | 13.100      | 0.00  | 1.08  | 1.71  | 1.71  | 0.15   | 2.17 | 16.39  | 5.95           | 79.24                 |
| QA ISLAMIC BK          | 19.300      | 0.00  | 0.78  | 3.76  | 3.76  | -10.23 | 1.53 | 10.87  | 3.17           | 45.60                 |
| MASRAF AL RAYA         | 2.345       | 0.86  | 1.08  | 0.69  | 0.69  | -11.68 | 0.89 | 15.25  | 4.26           | 21.80                 |
| MESAIEED PETRO         | 1.685       | 0.66  | -0.12 | 2.43  | 2.43  | -5.76  | 1.31 | 21.00  | 5.10           | 21.16                 |
| <b>Oman</b>            |             |       |       |       |       |        |      |        |                |                       |
| BANK MUSCAT            | 0.25        | -0.40 | -1.19 | -0.40 | -0.40 | -5.30  | 0.82 | 9.75   | 6.20           | 1.88                  |
| OMANTEL                | 1.000       | -0.20 | 0.00  | -1.48 | -1.48 | -5.66  | 1.22 | 11.29  | 6.00           | 0.75                  |
| BANK DHOFAR            | 0.154       | -3.75 | -3.75 | -6.67 | -6.67 | -3.75  | 0.64 | 15.28  | 5.03           | 0.46                  |
| 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               | 0.330       | -2.94 | -2.94 | -7.04 | -7.04 | -16.52 | 0.70 | 7.17   | 6.06           | 0.22                  |

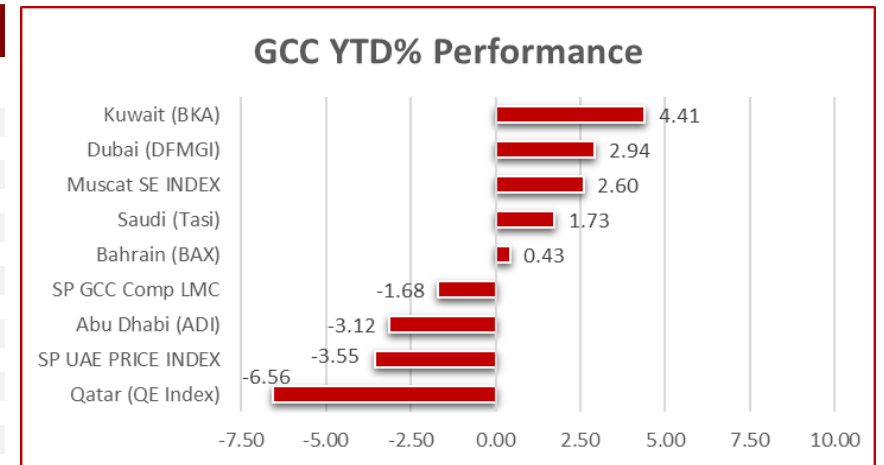
\* GCC Markets performance at the latest close.

| 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 up today by + 0.64 %The leading sector best performance indices today are Insurance 9.92 % Consumer services 0.8 % Financial services 0.72 % respectively.

#### KSA

Saudi Armco have negative performance today by -0.35 %, SABIC have negative performance today by -0.75 %, STC has a positive performance today by + 1.04 %, Al Rajhi Bank have negative performance today by -0.35 %.



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