



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 23rd September 2024

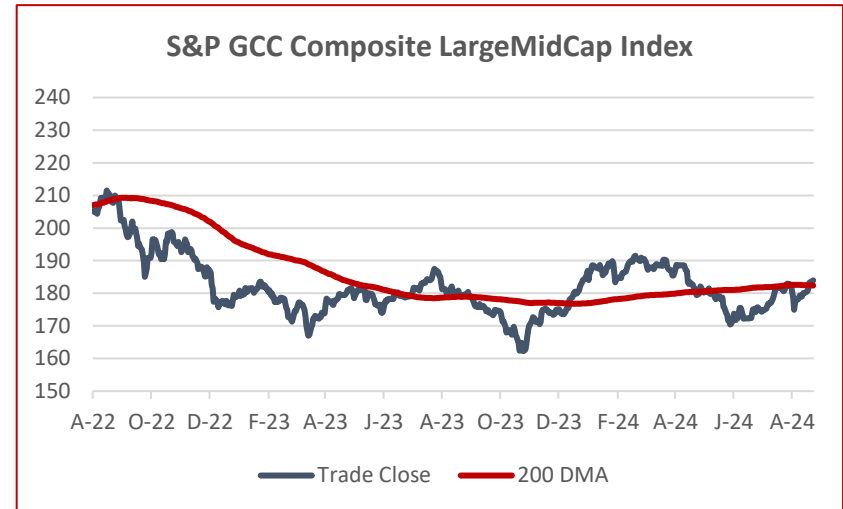




Sunday, September 22, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,129.6	0.41	0.41	-0.13	3.85	1.36	3.06	23.35	3.37	10,114.40
Qatar (QE Index)	10,439.1	-0.24	-0.24	2.31	4.73	-3.62	1.22	11.82	4.28	530.88
Dubai (DFMGI)	4,436.4	0.34	1.28	2.56	10.08	9.28	1.56	8.73	5.36	671.90
Abu Dhabi (ADI)	9,438.5	-0.65	0.94	1.65	4.17	-1.45	2.72	17.06	2.06	2,624.68
Bahrain (BAX)	2,032.1	0.22	0.22	3.81	0.33	3.07	0.92	10.62	4.49	7.90
Muscat SE INDEX	4,708.5	-0.35	-0.35	-0.80	0.45	4.31	0.84	10.01	5.79	7.34
SP GCC Comp LMC	184.6	0.06	0.06	0.74	5.50	-0.17	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.6	0.00	0.00	2.79	10.92	2.74				
Developed Markets										
MSCI World Index	3,676.8	-0.34	1.15	0.43	4.70	16.02				
U.S. (S&P 500)	5,702.6	-0.19	1.36	0.96	4.43	19.55	4.74	27.20	1.56	50,734.32
U.K. (FTSE 100)	8,230.0	-1.19	-0.52	-1.75	0.81	6.42	1.76	15.03	3.72	2,141.41
Japan (topix)	2,642.4	0.97	2.77	-2.59	-5.95	11.66	1.38	14.38	2.20	933,324.60
Emerging Markets										
MSCI EM Index	1,106.4	0.57	2.23	0.59	1.86	8.08				
China (SSE Composite)	2,736.8	0.03	1.21	-3.71	-7.77	-8.00	1.36	12.00		44,025.04
India (Sensex)	84,544.3	1.63	1.99	2.64	6.97	17.03	4.52	24.54	1.08	167,302.20
Kuwait										
Kuwait All Share Index	7,170.1	-0.03	-0.03	-0.15	3.36	5.18	1.47	15.42	3.70	43.15
Kuwait Premier Index	7,758.0	-0.42	-0.42	-0.82	2.84	3.76	1.58	16.60	3.49	35.46
Kuwait Main Index	6,258.5	1.79	1.79	3.09	5.85	12.37	1.10	11.25	4.79	7.69
Kuwait Sector										
Banking	1,762.9	-0.49	-0.49	-0.89	2.97	7.01	1.75	17.45	3.10	26.39
Telecom	1,015.5	-0.41	-0.41	0.19	3.24	-8.11	1.49	12.26	8.28	3.10
Industrials	739.7	-0.86	-0.86	-2.78	-4.26	-18.53	0.79	11.49	5.84	2.50
Financial Services	1,411.1	-0.32	-0.32	0.90	7.61	16.40	1.16	12.66	2.93	4.72
Real Estate	1,376.5	2.21	2.21	2.44	6.24	13.48	1.06	14.86	2.06	2.92
Basic Materials	814.3	0.12	0.12	-0.30	7.79	9.17	1.46	14.07	10.76	0.46
Health Care	436.8	-4.08	-4.08	-1.05	-1.10	-9.41	1.46	16.52	2.40	
Consumer Staples	1,001.8	1.04	1.04	1.00	21.52	52.11	2.17	20.66	2.05	0.30
Insurance	2,228.7	12.96	12.96	13.61	-11.55	-2.79	1.21	12.14	3.56	0.90
Consumer Discretionary	1,802.1	0.34	0.34	1.62	17.02	12.36				
Energy	1,118.3	0.59	0.59	1.75	8.55	17.84	0.95	9.50	5.66	0.23
Technology	1,527.8	-1.41	-1.41	-4.55	-3.67	164.15	1.77	636.36		0.02
Utilities	392.1	-0.67	-0.67	-2.61	-6.87	-13.87				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices gained slightly during early trade on Monday, boosted by concerns conflict in the Middle East may impact supply in the key producing region and expectations the U.S. interest rate cut last week will support demand. Brent crude futures for November were up 20 cents, or 0.3% at \$74.69.

Kuwait Market

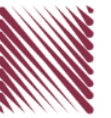
The market closed down by -0.03% at 7,170.1 value traded 72.1 million KD, Premier market value reached 25.8 million KD down by -0.42% at 7,758.0.

KSA Market

The market closed up by +0.41% at 12,129.6.

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	0.877	-0.23	-0.23	-0.11	2.45	3.00	1.68	13.14	3.86	7.32
KFH	0.719	-0.69	-0.69	-1.10	1.99	7.95	2.08	20.07	2.67	12.32
ZAIN	0.469	-0.85	-0.85	0.43	5.16	-7.50	1.77	10.96	7.46	2.03
BOUBYAN BANK	0.582	-1.02	-1.02	-1.02	3.19	2.82	2.40	29.57	1.30	2.44
AGILITY	0.243	-1.22	-1.22	-5.08	-12.90	-14.20	0.71	7.86	8.23	0.65
Saudi Arabia										
ARAMCO	27.45	0.18	0.18	-1.79	-1.61	-16.82	4.40	15.23	6.92	6,643.25
SABIC	73.40	0.41	0.41	-1.87	-0.54	-12.10	1.34	114.52	4.50	220.21
STC	43.85	0.46	0.46	1.98	15.09	11.45	2.86	15.92	3.65	219.26
AL-RAJHI BANK	89.40	-0.56	-0.56	1.48	11.75	3.35	3.07	21.56	2.68	357.62
NCB	35.20	0.00	0.00	0.57	-2.90	-8.93	1.17	10.76	5.11	211.21
Abu Dhabi										
ETISALAT.AD	18.62	0.11	3.56	2.65	15.65	-5.19	3.69	14.60	4.38	161.93
FAB.AD	13.58	-1.31	0.00	1.34	8.99	-2.72	1.22	9.41	5.23	150.03
EMIRATES NBD	20.35	0.49	1.75	3.30	23.33	17.63	1.11	5.71	5.90	128.54
DB ISLAMIC DB	6.28	1.29	2.28	1.78	9.41	9.79	1.03	6.88	7.17	45.47
EMAR.DU	8.73	0.58	1.39	3.44	6.46	10.23	1.00	6.42	5.73	76.81
Qatar										
QNB	16.660	-0.83	-0.83	5.18	13.72	0.79	1.41	10.31	3.93	154.25
INDUSTREIS QAT	12.920	-0.54	-0.54	0.16	0.31	-1.22	2.08	15.00	5.42	78.11
QA ISLAMIC BK	20.310	0.25	0.25	3.94	9.19	-5.53	1.61	11.44	3.02	47.99
MASRAF AL RAYA	2.423	-0.25	-0.25	5.35	4.04	-8.74	0.92	15.76	4.13	22.51
MESAIEED PETRO	1.639	-0.06	-0.06	-0.67	-0.36	-8.33	1.26	22.98	4.27	20.57
Oman										
BANK MUSCAT	0.259	0.00	0.00	0.39	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.995	0.00	0.00	-1.39	-1.97	-6.13	1.20	11.64	6.03	0.74
BANK DHOFAR	0.157	0.00	0.00	-0.63	-4.85	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.279	0.00	0.00	3.33	10.28	-0.36	0.66	9.68	3.05	0.46
OMINVEST	0.360	-2.44	-2.44	9.09	1.41	-8.93	0.80	8.68	5.56	0.24

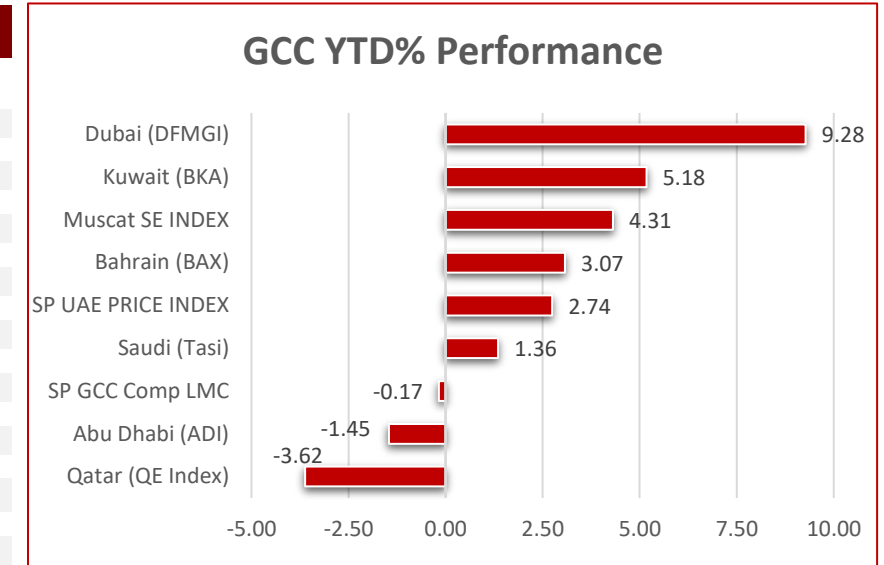
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
11-Sept. 24	24.62%	15.30%	0.06%	3.64%	7.83%	17.57%	12.97%	5.94%	5.64%
11-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%

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 -0.03 % The leading sector bottom performance indices today are Health care -4.08 % Technology -1.41 % Industrials -0.86 % respectively

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC have positive performance today by + 0.41 %. STC has a positive performance today by + 0.46 %, Al Rajhi Bank have negative performance today by -0.56 %



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