

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 23rd June 2024





Sunday, June 23, 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)	11,730.0	2.01	2.01	1.97	-5.42	-1.98	2.74	21.61	3.27	10,116.17
Qatar (QE Index)	9,716.9	0.15	0.15	4.27	-1.32	-10.28	1.13	11.09	4.87	488.96
Dubai (DFMGI)	4,012.2	0.64	0.71	0.86	-5.51	-1.17	1.39	8.18	6.01	592.43
Abu Dhabi (ADI)	9,013.1	0.71	0.90	1.70	-2.33	-5.90	2.60	16.14	2.13	2,514.58
Bahrain (BAX)	2,040.0	-0.09	-0.09	0.04	-0.13	3.47	0.88	11.09	4.25	8.05
Muscat SE INDEX	4,657.3	-0.47	-0.47	-3.89	0.46	3.17	0.80	9.97	5.88	6.42
SP GCC Comp LMC	175.0	1.50	1.50	2.59	-5.60	-5.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.6	0.00	0.00	1.29	-6.69	-8.85				

Developed Markets

MSCI World Index	3,507.8	-0.34	0.45	1.82	2.04	10.69				
U.S. (S&P 500)	5,464.6	-0.16	0.61	3.55	4.00	14.57	4.53	26.73	1.61	48,308.05
U.K. (FTSE 100)	8,237.7	-0.42	1.12	-0.46	3.58	6.52	1.74	14.82	3.70	2,154.13
Japan (topix)	2,724.7	-0.03	-0.80	-1.72	-1.59	15.14	1.42	15.10	2.12	959,464.50

Emerging Markets

MSCI EM Index	1,086.9	-0.81	0.93	3.62	4.19	6.17				
China (SSE Composite)	2,998.1	-0.24	-1.14	-2.87	-1.41	0.78	1.36	12.00		44,025.04
India (Sensex)	77,209.9	-0.35	0.28	4.39	4.83	6.88	4.87	22.79	1.15	151,514.54

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,008.9	-0.42	-0.42	-0.61	-4.34	2.81	1.44	15.08	3.65	42.33
Kuwait Premier Index	7,628.2	-0.33	-0.33	-0.71	-5.08	2.02	1.56	16.45	3.46	35.00
Kuwait Main Index	5,950.0	-0.85	-0.85	-0.13	-0.59	6.83	1.04	10.40	4.53	7.33
Kuwait Sector										
Banking	1,723.7	-0.53	-0.53	-1.03	-2.70	4.63	1.72	17.20	3.06	25.95
Telecom	996.7	-0.03	-0.03	-0.03	-6.42	-9.81	1.46	11.89	8.43	3.05
Industrials	776.5	-0.86	-0.86	4.71	-25.72	-14.48	0.83	11.70	5.51	2.65
Financial Services	1,315.7	-1.16	-1.16	-3.28	-2.79	8.54	1.08	11.94	3.02	4.40
Real Estate	1,335.3	0.56	0.56	0.67	3.06	10.09	1.02	14.24	2.02	2.82
Basic Materials	821.1	0.10	0.10	-2.28	3.94	10.08	1.48	14.38	10.68	0.46
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	910.0	3.83	3.83	3.79	17.78	38.18	1.90	19.45	2.34	0.27
Insurance	2,560.6	-0.08	-0.08	2.00	-0.26	11.68	1.40	12.63	3.10	1.03
Consumer Discretionary	1,562.1	0.39	0.39	-0.39	-10.82	-2.61				
Energy	1,075.5	2.06	2.06	0.62	3.12	13.33	0.91	9.88	6.43	0.21
Technology	1,702.4	0.00	0.00	0.00	-10.69	194.34	2.10			0.02
Utilities	421.1	-0.62	-0.62	0.63	-5.33	-7.51				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Monday for a second straight session, weighed down by a stronger dollar after concerns of higher-for-longer interest rates resurfaced and cooled investors' risk appetite. Brent crude futures slid 40 cents, or 0.5%, to \$84.84 a barrel.

Kuwait Market

The market closed down by – 0.42% at 7,008.9 value traded 42.3 million KD, Premier market value reached 33.5 million KD down by – 0.33% at 7,628.2.

KSA Market

The market closed up by + 2.01% at 11,730.0.

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	0.862	0.23	0.23	0.58	-4.73	1.24	1.70	13.03	3.87	7.18
KFH	0.711	-0.42	-0.42	-2.60	-2.64	6.75	2.08	20.92	2.58	12.17
ZAIN	0.453	-0.22	-0.22	1.12	-8.11	-10.65	1.58	10.29	7.73	1.96
BOUBYAN BANK	0.563	-0.88	-0.88	-2.76	-3.43	-0.54	2.37	30.04	1.34	2.37
AGILITY	0.281	-1.75	-1.75	-4.10	-22.78	-0.78	0.76	8.25	7.12	0.75
Saudi Arabia										
ARAMCO	28.10	1.44	1.44	-3.10	-8.91	-14.85	4.46	15.50	6.67	6,798.75
SABIC	74.80	1.77	1.77	-1.58	-4.47	-10.42	1.34	196.21	4.41	224.35
STC	37.50	2.46	2.46	4.17	-2.77	-4.69	2.32	13.92	4.27	187.46
AL-RAJHI BANK	81.00	2.53	2.53	6.44	-1.58	-6.36	2.99	20.19	2.84	323.93
NCB	36.40	3.56	3.56	7.53	-9.45	-5.82	1.20	11.24	4.81	218.35
Abu Dhabi										
ETISALAT.AD	15.86	-1.12	-0.25	-1.49	-13.62	-19.25	3.17	13.20	5.04	137.91
FAB.AD	11.80	-1.17	1.90	1.72	-10.74	-15.47	1.09	8.20	6.02	130.34
EMIRATES NBD	16.40	-0.61	0.92	5.47	-6.29	-5.20	0.96	4.78	7.32	103.58
DB ISLAMIC DB	5.76	0.70	3.04	4.35	-1.20	0.70	0.97	6.42	7.81	41.70
EMAR.DU	7.90	0.89	1.94	3.13	-3.30	-0.25	0.88	6.16	6.33	69.82
Qatar										
QNB	14.220	0.14	0.14	5.33	-0.07	-13.97	1.26	8.98	4.57	131.36
INDUSTREIS QAT	12.430	0.24	0.24	7.62	4.02	-4.97	2.06	15.55	6.28	75.21
QA ISLAMIC BK	17.910	0.34	0.34	4.13	-2.40	-16.70	1.48	10.23	4.05	42.33
MASRAF AL RAYA	2.320	-0.04	-0.04	0.74	0.00	-12.62	0.90	15.12	4.31	21.58
MESAIEED PETRO	1.670	-0.60	-0.60	-2.91	-15.83	-6.60	1.30	20.82	5.15	20.98
Oman										
BANK MUSCAT	0.25	-0.40	-0.40	-3.47	-4.58	-5.30	0.82	9.75	6.20	1.88
OMANTEL	1.014	-0.20	-0.20	-4.07	-1.55	-4.34	1.24	11.45	5.92	0.76
BANK DHOFAR	0.153	0.00	0.00	-2.55	-4.38	-4.38	0.64	15.18	5.07	0.46
NAT BANK OF OMAN	0.255	-0.78	-0.78	-8.93	-1.92	-8.93	0.61	8.93	3.33	0.41
OMINVEST	0.373	2.19	2.19	-3.12	1.62	-5.64	0.79	8.10	5.36	0.25

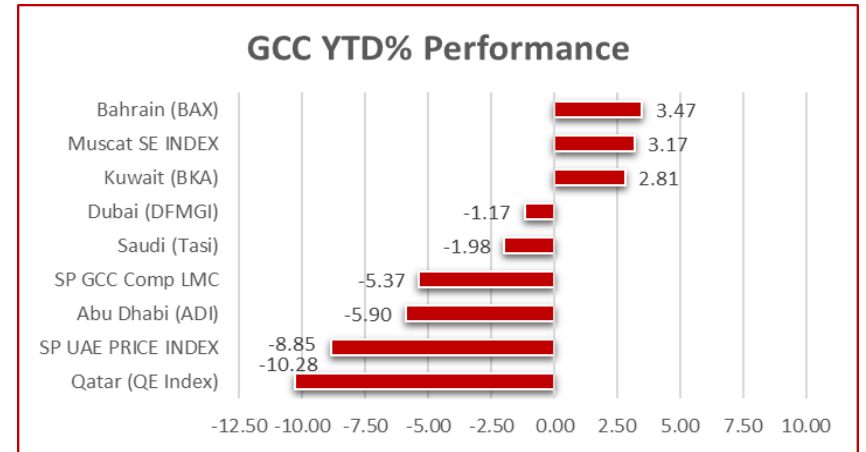
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
12-June-24	24.49%	13.84%	0.06%	2.36%	6.10%	17.72%	13.07%	6.07%	5.60%
19-June-24	24.49%	13.73%	0.06%	2.35%	6.24%	17.72%	13.06%	6.05%	5.59%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

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 Financial services -1.16 % Industrials -0.86 % Utilities -0.62 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.44 %, SABIC have positive performance today by + 1.7%, STC has a positive performance today by + 2.46 %, Al Rajhi Bank has a positive performance today by + 2.53 %.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw