



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 23rd September 2024





Monday, September 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)	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)	10,443.0	0.04	-0.20	2.35	4.77	-3.58	1.22	11.82	4.28	530.87
Dubai (DFMGI)	4,434.1	-0.05	-0.05	2.51	10.03	9.22	1.56	8.71	5.37	671.33
Abu Dhabi (ADI)	9,453.8	0.16	0.16	1.82	4.34	-1.30	2.73	17.09	2.05	2,625.11
Bahrain (BAX)	2,028.9	-0.16	0.06	3.65	0.17	2.91	0.92	10.61	4.49	7.89
Muscat SE INDEX	4,712.0	0.07	-0.28	-0.73	0.53	4.38	0.84	10.01	5.80	7.33
SP GCC Comp LMC	184.4	-0.11	-0.05	0.63	5.39	-0.28	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.1	-0.39	-0.39	2.39	10.49	2.34				
Developed Markets										
MSCI World Index	3,688.3	0.31	0.31	0.74	5.03	16.38				
U.S. (S&P 500)	5,718.6	0.28	0.28	1.24	4.73	19.89	4.74	27.20	1.56	50,734.32
U.K. (FTSE 100)	8,259.7	0.36	0.36	-1.40	1.17	6.81	1.77	15.07	3.71	2,149.23
Japan (topix)	2,642.4	0.97	2.77	-2.59	-5.95	11.66	1.38	14.38	2.20	932,964.84
Emerging Markets										
MSCI EM Index	1,110.7	0.38	0.38	0.98	2.25	8.49				
China (SSE Composite)	2,748.9	0.44	0.44	-3.28	-7.36	-7.60	1.36	12.00		44,025.04
India (Sensex)	84,928.6	0.45	0.45	3.11	7.46	17.56	4.54	24.66	1.07	168,166.72
Kuwait										
Kuwait All Share Index	7,157.0	-0.18	-0.22	-0.33	3.17	4.98	1.47	15.42	3.70	43.15
Kuwait Premier Index	7,736.7	-0.27	-0.69	-1.09	2.56	3.47	1.58	16.60	3.49	35.46
Kuwait Main Index	6,273.7	0.24	2.04	3.34	6.11	12.64	1.10	11.25	4.79	7.69
Kuwait Sector										
Banking	1,759.7	-0.18	-0.67	-1.07	2.78	6.81	1.75	17.45	3.10	26.39
Telecom	1,016.9	0.14	-0.27	0.33	3.38	-7.98	1.49	12.26	8.28	3.10
Industrials	734.5	-0.71	-1.56	-3.46	-4.94	-19.10	0.79	11.49	5.84	2.50
Financial Services	1,410.0	-0.08	-0.40	0.82	7.53	16.31	1.16	12.66	2.93	4.72
Real Estate	1,367.4	-0.66	1.54	1.77	5.55	12.74	1.06	14.86	2.06	2.92
Basic Materials	806.8	-0.93	-0.82	-1.23	6.78	8.15	1.46	14.07	10.76	0.46
Health Care	450.3	3.09	-1.11	2.01	1.96	-6.61	1.46	16.52	2.40	
Consumer Staples	1,007.3	0.55	1.59	1.55	22.18	52.94	2.17	20.66	2.05	0.30
Insurance	2,249.4	0.93	14.00	14.67	-10.73	-1.89	1.21	12.14	3.56	0.90
Consumer Discretionary	1,793.5	-0.48	-0.14	1.13	16.46	11.82				
Energy	1,110.4	-0.71	-0.12	1.03	7.78	17.00	0.95	9.50	5.66	0.23
Technology	1,556.9	1.90	0.47	-2.73	-1.83	169.18	1.77	636.36		0.02
Utilities	392.1	0.00	-0.67	-2.61	-6.87	-13.87				

* 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 on Tuesday on concerns the intensifying conflict between Israel and Hezbollah may impact supply in the key Middle East producing region and a tropical storm may impact output in the U.S., the world's biggest crude producer, later this week. Brent crude futures for November were up 21 cents, or 0.3%, at \$74.11 a barrel.

Kuwait Market

The market closed down by -0.18% at 7,157.0 value traded 68.0 million KD, Premier market value reached 26.4 million KD down by -0.27% at 7,736.7.

KSA Market

The market is off as National day holiday.

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	0.880	0.34	0.11	0.23	2.80	3.36	1.68	13.19	3.84	7.33
KFH	0.719	0.00	-0.69	-1.10	1.99	7.95	2.08	20.07	2.67	12.30
ZAIN	0.469	0.00	-0.85	0.43	5.16	-7.50	1.77	10.96	7.46	2.03
BOUBYAN BANK	0.576	-1.03	-2.04	-2.04	2.13	1.76	2.38	29.27	1.31	2.42
AGILITY	0.238	-2.06	-3.25	-7.03	-14.70	-15.97	0.69	7.70	8.40	0.64
Saudi Arabia										
ARAMCO	27.45	0.18	0.18	-1.79	-1.61	-16.82	4.40	15.23	6.92	6,642.90
SABIC	73.40	0.41	0.41	-1.87	-0.54	-12.10	1.34	114.52	4.50	220.20
STC	43.85	0.46	0.46	1.98	15.09	11.45	2.86	15.92	3.65	219.25
AL-RAJHI BANK	89.40	-0.56	-0.56	1.48	11.75	3.35	3.07	21.56	2.68	357.60
NCB	35.20	0.00	0.00	0.57	-2.90	-8.93	1.17	10.76	5.11	211.20
Abu Dhabi										
ETISALAT.AD	18.66	0.21	0.21	2.87	15.90	-4.99	3.70	14.63	4.37	162.28
FAB.AD	13.62	0.29	0.29	1.64	9.31	-2.44	1.22	9.44	5.21	150.47
EMIRATES NBD	20.30	-0.25	-0.25	3.05	23.03	17.34	1.10	5.70	5.91	128.23
DB ISLAMIC DB	6.27	-0.16	-0.16	1.62	9.23	9.62	1.02	6.87	7.18	45.40
EMAR.DU	8.60	-1.49	-1.49	1.90	4.88	8.59	0.98	6.32	5.81	76.01
Qatar										
QNB	16.600	-0.36	-1.19	4.80	13.31	0.42	1.41	10.28	3.95	153.28
INDUSTREIS QAT	12.900	-0.15	-0.69	0.00	0.16	-1.38	2.08	14.97	5.43	78.02
QA ISLAMIC BK	20.340	0.15	0.39	4.09	9.35	-5.40	1.62	11.45	3.01	48.05
MASRAF AL RAYA	2.430	0.29	0.04	5.65	4.34	-8.47	0.93	15.80	4.12	22.59
MESAIEED PETRO	1.629	-0.61	-0.67	-1.27	-0.97	-8.89	1.25	22.84	4.30	20.46
Oman										
BANK MUSCAT	0.257	-0.77	-0.77	-0.39	2.39	-2.65	0.82	9.79	6.03	1.93
OMANTEL	0.995	0.00	0.00	-1.39	-1.97	-6.13	1.20	11.64	6.03	0.75
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	0.280	0.36	0.36	3.70	10.67	0.00	0.66	9.72	3.04	0.46
OMINVEST	0.360	0.00	-2.44	9.09	1.41	-8.93	0.80	8.68	5.56	0.24

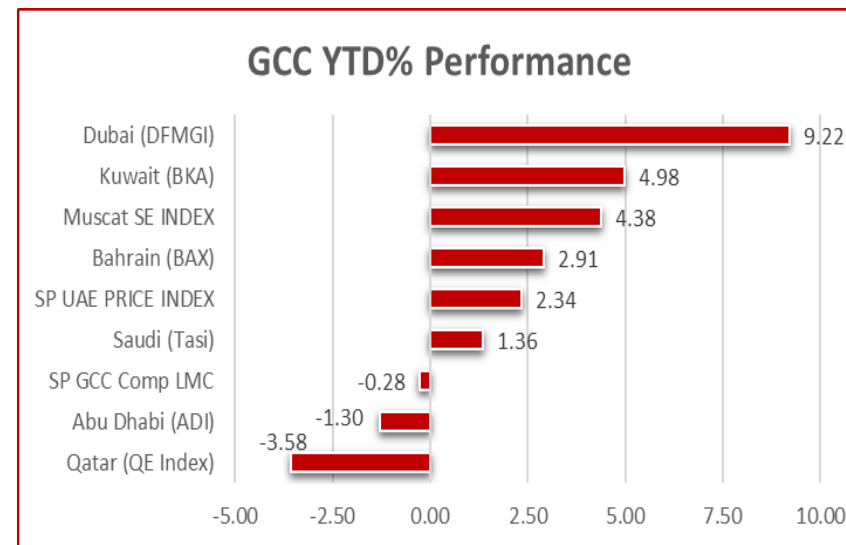
* GCC Markets performance at the latest close.

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%
18-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%

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.

Kuwait

The market is down today by -0.18 %The leading sector bottom performance indices today are Basic materials -0.93 % Energy -0.71 % Industrials -0.71 % respectively

KSA

The market is off as National day holiday.



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