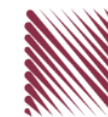


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday ,24th July 2024





Wednesday, July 24, 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)	12,101.2	-0.04	-0.71	3.61	3.61	1.12	3.22	25.43	3.18	10,217.07
Qatar (QE Index)	10,137.5	-0.03	1.03	1.70	1.70	-6.40	1.17	11.68	4.63	511.08
Dubai (DFMGI)	4,228.7	0.30	1.14	4.93	4.93	4.16	1.47	8.55	5.74	631.45
Abu Dhabi (ADI)	9,263.4	0.32	0.32	2.24	2.24	-3.28	2.67	16.57	2.07	2,577.95
Bahrain (BAX)	1,978.3	-0.07	-0.06	-2.33	-2.33	0.34	0.88	11.19	4.52	7.65
Muscat SE INDEX	4,654.4	0.13	-0.91	-0.70	-0.70	3.11	0.83	10.05	5.87	7.24
SP GCC Comp LMC	181.5	0.12	-0.13	3.71	3.71	-1.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	133.9	0.16	0.93	4.84	4.84	-2.89				
Developed Markets										
MSCI World Index	3,516.0	-1.81	-1.06	0.12	0.12	10.94				
U.S. (S&P 500)	5,427.1	-2.31	-1.41	-0.61	-0.61	13.78	4.63	27.07	1.59	49,288.61
U.K. (FTSE 100)	8,153.7	-0.17	-0.02	-0.13	-0.13	5.44	1.73	14.65	3.74	2,123.70
Japan (topix)	2,793.1	-1.42	-2.37	-0.59	-0.59	18.03	1.46	15.45	2.07	981,439.50
Emerging Markets										
MSCI EM Index	1,082.4	-0.42	-0.66	-0.35	-0.35	5.73				
China (SSE Composite)	2,902.0	-0.46	-2.69	-2.21	-2.21	-2.45	1.36	12.00		44,025.04
India (Sensex)	80,148.9	-0.35	-0.57	1.41	1.41	10.95	4.53	23.72	1.13	158,803.20
Kuwait										
Kuwait All Share Index	7,155.0	0.32	0.74	3.14	3.14	4.95	1.46	15.19	3.61	42.96
Kuwait Premier Index	7,802.7	0.39	0.57	3.43	3.43	4.36	1.59	16.56	3.42	35.54
Kuwait Main Index	6,015.2	-0.04	1.62	1.74	1.74	8.00	1.06	10.47	4.52	7.41
Kuwait Sector										
Banking	1,767.8	0.35	0.70	3.25	3.25	7.30	1.75	17.27	3.03	26.38
Telecom	998.7	0.38	0.50	1.53	1.53	-9.63	1.46	11.77	8.45	3.04
Industrials	794.9	0.73	0.45	2.89	2.89	-12.44	0.84	11.76	5.47	2.67
Financial Services	1,360.9	0.19	0.88	3.78	3.78	12.26	1.11	12.24	2.94	4.55
Real Estate	1,353.5	-0.08	-1.24	4.47	4.47	11.59	1.04	14.56	2.01	2.88
Basic Materials	750.5	-0.03	-0.30	-0.66	-0.66	0.61	1.35	13.17	11.67	0.42
Health Care	468.0	0.00	0.00	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	980.6	9.11	9.48	18.95	18.95	48.89	1.95	19.95	2.29	0.27
Insurance	2,312.9	-1.98	6.56	-8.21	-8.21	0.88	1.29	11.59	3.36	0.95
Consumer Discretionary	1,660.1	0.37	2.22	7.80	7.80	3.51				
Energy	1,066.6	-1.56	-0.27	3.53	3.53	12.39	0.92	10.08	6.23	0.22
Technology	1,578.7	-2.69	-5.24	-0.46	-0.46	172.96	1.88	268.67		0.02
Utilities	434.2	0.00	-1.79	3.13	3.13	-4.62				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

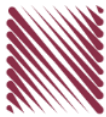
U.S. crude oil futures rebounded more than 1% Wednesday, breaking a three-day losing streak as an industry report pointed to falling U.S. crude inventories and as wildfires in Canada raise the risk of supply disruptions. The American Petroleum Institute reported that U.S. crude oil stocks fell by 3.86 million barrels for the week ended July 19, according to reports. It is the fourth consecutive week of inventory declines. Brent September contract: \$81.72 per barrel.

Kuwait Market

The market closed up by +0.32% at 7,155.0 value traded 41.3 million KD, Premier market value reached 32.6 million KD up by +0.39% at 7,802.7.

KSA Market

The market closed down by -0.04% at 12,101.2.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.874	0.00	0.34	2.10	2.10	2.65	1.67	13.10	3.87	7.31
KFH	0.733	0.55	1.10	3.97	3.97	10.05	2.12	20.46	2.62	12.61
ZAIN	0.456	0.66	1.11	2.24	2.24	-10.06	1.59	10.36	7.68	1.98
BOUBYAN BANK	0.573	-0.17	-1.04	1.60	1.60	1.23	2.36	29.12	1.32	2.42
AGILITY	0.285	1.06	-0.70	2.15	2.15	0.63	0.77	8.37	7.02	0.77
Saudi Arabia										
ARAMCO	28.00	-0.36	-1.58	0.36	0.36	-15.15	4.45	15.44	6.69	6,774.92
SABIC	78.00	0.26	-1.39	5.69	5.69	-6.59	1.40	204.60	4.23	233.96
STC	39.10	0.64	1.03	2.62	2.62	-0.63	2.42	14.51	4.09	195.47
AL-RAJHI BANK	84.40	0.84	0.48	5.50	5.50	-2.43	3.12	21.04	2.73	337.55
NCB	37.50	0.00	-2.09	3.45	3.45	-2.98	1.24	11.58	4.67	224.96
Abu Dhabi										
ETISALAT.AD	16.98	1.31	4.30	5.47	5.47	-13.54	3.39	14.13	4.71	147.65
FAB.AD	12.68	0.32	0.63	1.77	1.77	-9.17	1.17	8.81	5.60	140.06
EMIRATES NBD	17.65	-1.12	0.57	6.97	6.97	2.02	0.96	4.95	6.80	111.47
DB ISLAMIC DB	5.96	-1.32	0.00	3.83	3.83	4.20	0.97	6.53	7.55	43.15
EMAR.DU	8.43	-0.12	0.96	2.80	2.80	6.44	0.94	6.57	5.93	74.50
Qatar										
QNB	15.200	0.66	2.84	3.75	3.75	-8.05	1.29	9.41	4.31	140.37
INDUSTREIS QAT	12.970	-1.29	0.08	0.70	0.70	-0.84	2.15	16.23	6.01	78.45
QA ISLAMIC BK	19.370	0.10	1.15	4.14	4.14	-9.91	1.54	10.91	3.16	45.76
MASRAF AL RAYA	2.340	-0.34	0.86	0.47	0.47	-11.86	0.89	15.22	4.27	21.76
MESAIEED PETRO	1.667	-0.24	-1.19	1.34	1.34	-6.77	1.29	20.78	5.16	20.94
Oman										
BANK MUSCAT	0.252	0.80	-0.40	0.40	0.40	-4.55	0.82	9.83	6.15	1.89
OMANTEL	1.002	0.00	0.20	-1.28	-1.28	-5.47	1.22	11.31	5.99	0.75
BANK DHOFAR	0.154	0.00	-3.75	-6.67	-6.67	-3.75	0.64	15.28	5.03	0.46
NAT BANK OF OMAN	0.260	-0.76	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.332	0.61	-2.35	-6.48	-6.48	-16.01	0.70	7.21	6.02	0.22

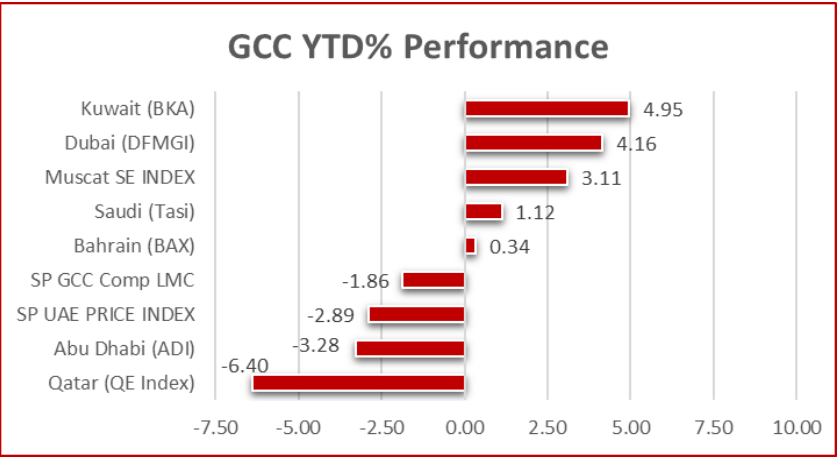
* GCC Markets performance at the latest close.

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 + 0.32 %The leading sector best performance indices today are Consumer services 9.11 % Industrials 0.73 % Telecom 0.38 % respectively.

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have positive performance today by + 0.25%, STC has a positive performance today by + 0.64 %, Al Rajhi Bank has a positive performance today by + 0.84 %.



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