



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 24th June 2024





Monday, June 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)	11,697.0	-0.28	1.72	1.68	-5.68	-2.26	2.71	21.33	3.28	10,077.78
Qatar (QE Index)	9,772.2	0.57	0.72	4.86	-0.76	-9.77	1.13	11.15	4.85	492.02
Dubai (DFMGI)	4,000.3	-0.30	-0.30	0.56	-5.79	-1.47	1.39	8.15	6.05	590.89
Abu Dhabi (ADI)	9,022.3	0.10	0.10	1.80	-2.23	-5.80	2.60	16.15	2.13	2,528.97
Bahrain (BAX)	2,037.9	-0.10	-0.19	-0.06	-0.23	3.37	0.88	11.07	4.26	8.04
Muscat SE INDEX	4,622.2	-0.75	-1.22	-4.61	-0.29	2.40	0.79	9.90	5.92	6.38
SP GCC Comp LMC	175.0	-0.01	1.49	2.58	-5.61	-5.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	125.8	0.14	0.14	1.44	-6.56	-8.72				
Developed Markets										
MSCI World Index	3,509.0	0.03	0.03	1.85	2.07	10.72				
U.S. (S&P 500)	5,447.9	-0.31	-0.31	3.23	3.68	14.22	4.55	26.82	1.61	48,486.07
U.K. (FTSE 100)	8,281.6	0.53	0.53	0.07	4.14	7.09	1.75	14.89	3.68	2,166.18
Japan (topix)	2,740.2	0.57	0.57	-1.17	-1.03	15.80	1.43	15.18	2.11	965,199.22
Emerging Markets										
MSCI EM Index	1,084.3	-0.24	-0.24	3.37	3.94	5.92				
China (SSE Composite)	2,963.1	-1.17	-1.17	-4.01	-2.57	-0.40	1.36	12.00		44,025.04
India (Sensex)	77,341.1	0.17	0.17	4.57	5.01	7.06	4.90	22.96	1.14	152,339.99
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,994.1	-0.21	-0.63	-0.82	-4.55	2.59	1.43	15.02	3.66	42.14
Kuwait Premier Index	7,620.0	-0.11	-0.44	-0.81	-5.18	1.91	1.56	16.40	3.48	34.88
Kuwait Main Index	5,907.2	-0.72	-1.56	-0.85	-1.31	6.06	1.03	10.31	4.57	7.26
Kuwait Sector										
Banking	1,725.2	0.09	-0.44	-0.94	-2.62	4.72	1.71	17.11	3.08	25.81
Telecom	986.0	-1.08	-1.11	-1.10	-7.43	-10.78	1.46	11.88	8.43	3.05
Industrials	774.7	-0.23	-1.08	4.47	-25.89	-14.67	0.82	11.59	5.56	2.63
Financial Services	1,306.1	-0.73	-1.88	-3.98	-3.50	7.75	1.06	11.80	3.06	4.35
Real Estate	1,324.2	-0.83	-0.27	-0.17	2.21	9.18	1.02	14.35	2.01	2.84
Basic Materials	817.8	-0.40	-0.30	-2.67	3.53	9.63	1.48	14.40	10.67	0.46
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	893.6	-1.81	1.95	1.91	15.65	35.68	1.97	20.20	2.26	0.28
Insurance	2,560.2	-0.01	-0.10	1.98	-0.28	11.66	1.40	12.62	3.10	1.03
Consumer Discretionary	1,554.5	-0.49	-0.10	-0.88	-11.26	-3.08				
Energy	1,053.4	-2.06	-0.04	-1.45	1.00	11.00	0.93	10.12	6.24	0.22
Technology	1,658.7	-2.56	-2.56	-2.56	-12.98	186.79	2.10			0.02
Utilities	421.1	0.00	-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 were little changed on Tuesday as worries about China's economic recovery prospects offset supply concerns stemming from tensions in the Middle East and Ukrainian attacks on Russian refineries. Brent futures for August delivery rose 7 cents, or 0.08%, to \$86.06 a barrel.

Kuwait Market

The market closed down by – 0.21% at 6,994.1 value traded 34.9 million KD, Premier market value reached 26.7 million KD down by – 0.11% at 7,620.0.

KSA Market

The market closed down by – 0.28% at 11,697.0.

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	0.858	-0.46	-0.23	0.12	-5.17	0.77	1.69	12.96	3.89	7.15
KFH	0.714	0.42	0.00	-2.19	-2.23	7.20	2.09	21.01	2.57	12.22
ZAIN	0.448	-1.10	-1.32	0.00	-9.13	-11.64	1.56	10.17	7.81	1.94
BOUBYAN BANK	0.565	0.36	-0.53	-2.42	-3.09	-0.18	2.38	30.15	1.34	2.37
AGILITY	0.281	0.00	-1.75	-4.10	-22.78	-0.78	0.76	8.25	7.12	0.75
Saudi Arabia										
ARAMCO	28.00	-0.36	1.08	-3.45	-9.24	-15.15	4.45	15.44	6.69	6,774.55
SABIC	74.50	-0.40	1.36	-1.97	-4.85	-10.78	1.34	195.42	4.43	223.45
STC	37.05	-1.20	1.23	2.92	-3.93	-5.84	2.30	13.75	4.32	185.21
AL-RAJHI BANK	81.30	0.37	2.91	6.83	-1.22	-6.01	3.00	20.27	2.83	325.13
NCB	36.40	0.00	3.56	7.53	-9.45	-5.82	1.20	11.24	4.81	218.35
Abu Dhabi										
ETISALAT.AD	16.02	1.01	1.01	-0.50	-12.75	-18.43	3.20	13.34	4.99	139.30
FAB.AD	11.96	1.36	1.36	3.10	-9.53	-14.33	1.10	8.31	5.94	132.11
EMIRATES NBD	16.25	-0.91	-0.91	4.50	-7.14	-6.07	0.95	4.74	7.38	102.63
DB ISLAMIC DB	5.66	-1.74	-1.74	2.54	-2.92	-1.05	0.96	6.30	7.95	40.98
EMAR.DU	7.89	-0.13	-0.13	3.00	-3.43	-0.38	0.88	6.15	6.34	69.73
Qatar										
QNB	14.330	0.77	0.92	6.15	0.70	-13.31	1.27	9.05	4.54	132.39
INDUSTREIS QAT	12.490	0.48	0.73	8.14	4.52	-4.51	2.07	15.63	6.24	75.59
QA ISLAMIC BK	18.100	1.06	1.40	5.23	-1.36	-15.81	1.49	10.34	4.01	42.78
MASRAF AL RAYA	2.324	0.17	0.13	0.91	0.17	-12.47	0.90	15.15	4.30	21.62
MESAIEED PETRO	1.665	-0.30	-0.89	-3.20	-16.08	-6.88	1.29	20.75	5.17	20.92
Oman										
BANK MUSCAT	0.249	-0.40	-0.80	-3.86	-4.96	-5.68	0.81	9.72	6.22	1.87
OMANTEL	1.010	-0.39	-0.59	-4.45	-1.94	-4.72	1.23	11.40	5.94	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	0.00	-0.78	-8.93	-1.92	-8.93	0.61	8.93	3.33	0.42
OMINVEST	0.360	-3.49	-1.37	-6.49	-1.92	-8.93	0.76	7.82	5.56	0.24

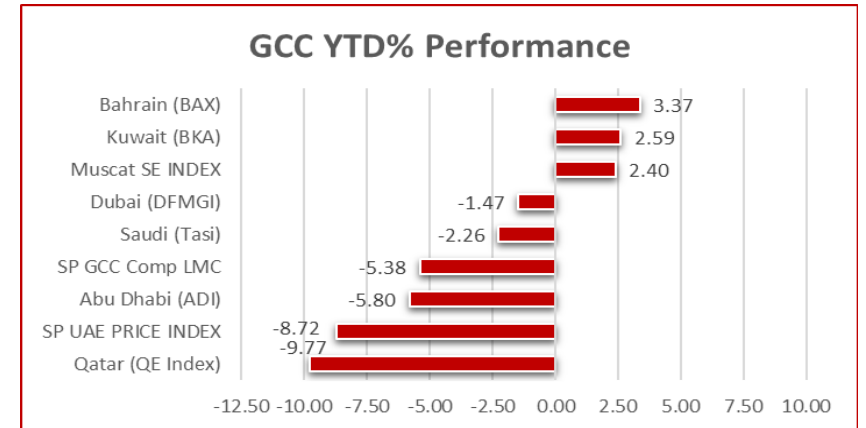
* GCC Markets performance at the latest close.

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

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.21 % The leading sector bottom performance indices today are Technology -2.56 % Energy -2.06 % Consumer services -1.81 % respectively.

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have negative performance today by -0.4%, STC have negative performance today by -1.2 %, Al Rajhi Bank has a positive performance today by + 0.37 %.



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