



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 24th September 2024





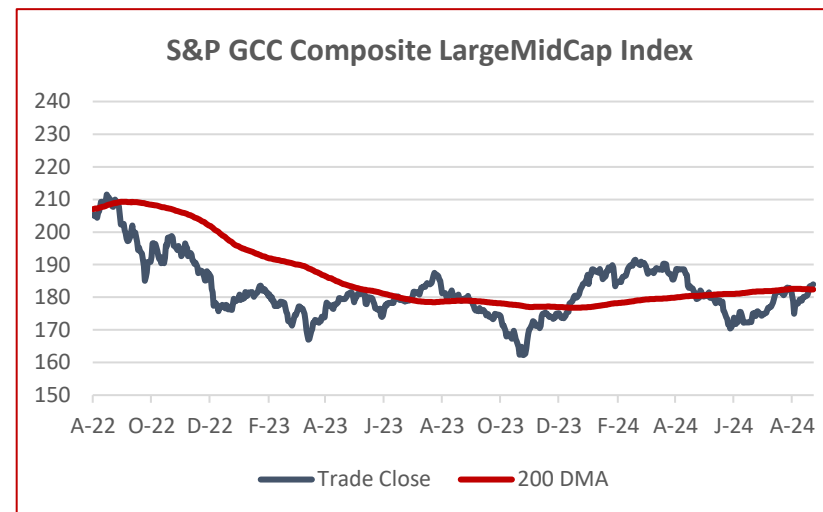
Tuesday, September 24, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,268.4	1.14	1.56	1.01	5.04	2.52	3.09	23.55	3.33	10,190.99
Qatar (QE Index)	10,491.0	0.46	0.26	2.82	5.25	-3.14	1.22	11.87	4.26	532.49
Dubai (DFMGI)	4,461.5	0.62	0.57	3.14	10.71	9.89	1.57	8.78	5.33	676.19
Abu Dhabi (ADI)	9,460.8	0.07	0.24	1.89	4.42	-1.22	2.73	17.11	2.05	2,624.57
Bahrain (BAX)	2,025.2	-0.18	-0.12	3.46	-0.01	2.73	0.92	10.57	4.50	7.88
Muscat SE INDEX	4,715.9	0.08	-0.20	-0.64	0.61	4.47	0.84	10.03	5.79	7.34
SP GCC Comp LMC	186.2	0.95	0.90	1.58	6.39	0.67	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.4	0.27	-0.12	2.67	10.79	2.62				

Developed Markets										
MSCI World Index	3,702.3	0.38	0.69	1.12	5.43	16.82				
U.S. (S&P 500)	5,732.9	0.25	0.53	1.50	4.99	20.19	4.75	27.27	1.56	50,883.84
U.K. (FTSE 100)	8,282.8	0.28	0.64	-1.12	1.45	7.11	1.78	15.09	3.70	2,156.04
Japan (topix)	2,656.7	0.54	0.54	-2.06	-5.44	12.27	1.39	14.46	2.19	937,452.51
Emerging Markets										
MSCI EM Index	1,132.0	1.93	2.31	2.92	4.22	10.58				
China (SSE Composite)	2,863.1	4.15	4.62	0.74	-3.51	-3.76	1.36	12.00		44,025.04
India (Sensex)	84,914.0	-0.02	0.44	3.09	7.44	17.54	4.54	24.64	1.07	168,046.39

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,168.7	0.16	-0.05	-0.17	3.34	5.15	1.47	15.39	3.71	43.07
Kuwait Premier Index	7,749.6	0.17	-0.52	-0.93	2.73	3.65	1.58	16.56	3.50	35.37
Kuwait Main Index	6,283.1	0.15	2.19	3.50	6.27	12.81	1.11	11.31	4.78	7.71
Kuwait Sector										
Banking	1,763.1	0.19	-0.48	-0.88	2.98	7.02	1.75	17.42	3.11	26.34
Telecom	1,021.0	0.40	0.13	0.73	3.80	-7.61	1.49	12.28	8.27	3.11
Industrials	727.7	-0.93	-2.47	-4.36	-5.82	-19.85	0.78	11.41	5.88	2.48
Financial Services	1,416.6	0.47	0.07	1.30	8.03	16.86	1.16	12.63	2.93	4.71
Real Estate	1,368.5	0.08	1.62	1.85	5.63	12.83	1.05	14.89	2.08	2.90
Basic Materials	811.5	0.59	-0.23	-0.65	7.41	8.79	1.45	13.94	10.86	0.46
Health Care	450.3	0.00	-1.11	2.01	1.96	-6.61	1.51	17.03	2.33	
Consumer Staples	999.4	-0.78	0.79	0.76	21.23	51.75	2.19	20.77	2.04	0.31
Insurance	2,255.4	0.27	14.31	14.97	-10.49	-1.63	1.23	12.25	3.53	0.91
Consumer Discretionary	1,793.3	-0.01	-0.15	1.12	16.45	11.81				
Energy	1,111.2	0.07	-0.05	1.11	7.86	17.09	0.95	9.43	5.70	0.23
Technology	1,556.9	0.00	0.47	-2.73	-1.83	169.18	1.81	648.48		0.02
Utilities	400.0	2.01	1.33	-0.65	-5.00	-12.14				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices steadied on Wednesday after rising in the previous session on fading excitement for the economic stimulus in China, the world's biggest crude importer, though an industry report showing falling U.S. crude and fuel inventories supported the market. Brent crude futures gained 3 cents at \$75.20 a barrel.

Kuwait Market

The market closed up by +0.16% at 7,168.7 value traded 64.5 million KD, Premier market value reached 28.7 million KD up by +0.17% at 7,749.6.

KSA Market

The market closed positive by +1.14% at 12,268.4.

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	0.885	0.57	0.68	0.80	3.39	3.94	1.69	13.26	3.82	7.36
KFH	0.718	-0.14	-0.83	-1.24	1.84	7.80	2.07	20.04	2.67	12.28
ZAIN	0.472	0.64	-0.21	1.07	5.83	-6.90	1.78	11.03	7.42	2.04
BOUBYAN BANK	0.572	-0.69	-2.72	-2.72	1.42	1.05	2.36	29.07	1.32	2.40
AGILITY	0.233	-2.10	-5.28	-8.98	-16.49	-17.73	0.68	7.54	8.58	0.62
Saudi Arabia										
ARAMCO	27.55	0.36	0.55	-1.43	-1.25	-16.52	4.42	15.29	6.90	6,666.21
SABIC	75.70	3.13	3.56	1.20	2.57	-9.34	1.39	118.11	4.36	227.07
STC	43.55	-0.68	-0.23	1.28	14.30	10.68	2.84	15.82	3.67	217.72
AL-RAJHI BANK	89.90	0.56	0.00	2.04	12.38	3.93	3.09	21.68	2.67	359.55
NCB	36.00	2.27	2.27	2.86	-0.69	-6.86	1.19	11.01	5.00	215.97
Abu Dhabi										
ETISALAT.AD	18.90	1.29	1.50	4.19	17.39	-3.77	3.75	14.82	4.31	164.36
FAB.AD	13.64	0.15	0.44	1.79	9.47	-2.29	1.22	9.45	5.21	150.68
EMIRATES NBD	20.40	0.49	0.25	3.55	23.64	17.92	1.11	5.72	5.88	128.85
DB ISLAMIC DB	6.31	0.64	0.48	2.27	9.93	10.31	1.03	6.92	7.13	45.69
EMAR.DU	8.67	0.81	-0.69	2.73	5.73	9.47	0.99	6.37	5.77	76.63
Qatar										
QNB	16.630	0.18	-1.01	4.99	13.52	0.60	1.41	10.30	3.94	153.60
INDUSTREIS QAT	12.880	-0.16	-0.85	-0.16	0.00	-1.53	2.07	14.95	5.43	77.92
QA ISLAMIC BK	20.680	1.67	2.07	5.83	11.18	-3.81	1.64	11.64	2.96	48.87
MASRAF AL RAYA	2.423	-0.29	-0.25	5.35	4.04	-8.74	0.92	15.76	4.13	22.53
MESAIEED PETRO	1.635	0.37	-0.30	-0.91	-0.61	-8.56	1.25	22.92	4.28	20.54
Oman										
BANK MUSCAT	0.258	0.39	-0.39	0.00	2.79	-2.27	0.82	9.82	6.01	1.94
OMANTEL	1.000	0.50	0.50	-0.89	-1.48	-5.66	1.21	11.70	6.00	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	0.00	0.36	3.70	10.67	0.00	0.66	9.72	3.04	0.46
OMINVEST	0.358	-0.56	-2.98	8.48	0.85	-9.43	0.79	8.63	5.59	0.24

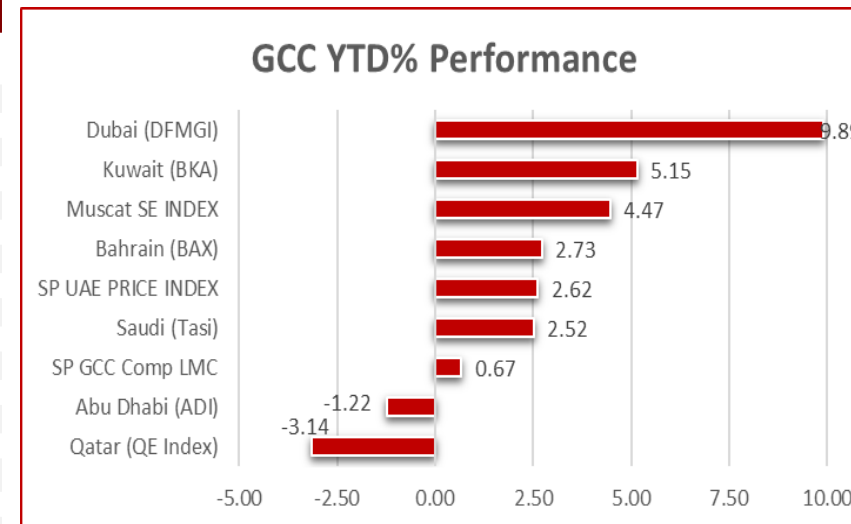
* GCC Markets performance at the latest close.

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

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.16 %The leading sector best performance indices today are Utilities 2.01 % Basic materials 0.59 % Financial services 0.47 % respectively

KSA

Saudi Armco has a positive performance today by + 0.36 %, SABIC have positive performance today by + 3.1%, STC have negative performance today by -0.68 %, Al Rajhi Bank has a positive performance today by + 0.56 %.



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