

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

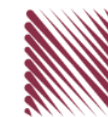
## GCC DAILY MORNING BRIEF

Thursday, 24<sup>th</sup> October 2024



# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP

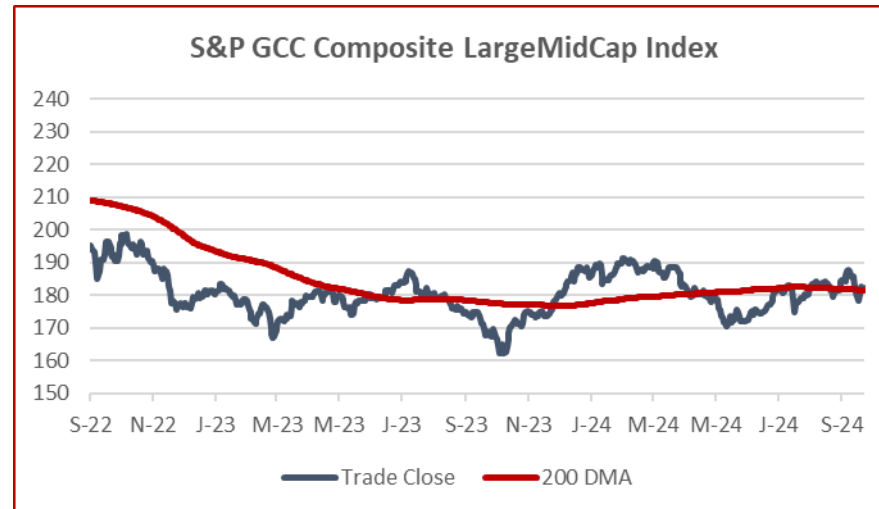


| * Market Watch     | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)       | 11,901.8    | -0.46 | -0.05 | -2.65 | -2.65 | -0.55 | 2.94 | 22.25 | 3.12           | 9,960.38              |
| Qatar (QE Index)   | 10,415.3    | -1.49 | -2.96 | -1.87 | -1.87 | -3.83 | 1.22 | 11.69 | 4.30           | 529.75                |
| Dubai (DFMGI)      | 4,464.2     | -0.07 | -0.11 | -0.87 | -0.87 | 9.96  | 1.57 | 8.78  | 5.36           | 673.95                |
| Abu Dhabi (ADI)    | 9,204.9     | -0.45 | -0.89 | -2.34 | -2.34 | -3.89 | 2.67 | 16.58 | 2.09           | 2,610.25              |
| Bahrain (BAX)      | 1,990.3     | 0.01  | -0.48 | -1.12 | -1.12 | 0.95  | 0.90 | 10.39 | 4.58           | 7.71                  |
| Muscat SE INDEX    | 4,806.5     | 0.22  | 0.13  | 2.04  | 2.04  | 6.48  | 0.86 | 10.36 | 5.71           | 7.49                  |
| SP GCC Comp LMC    | 180.7       | -0.73 | -0.45 | -2.66 | -2.66 | -2.31 | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX | 137.1       | -1.04 | -1.00 | -3.44 | -3.44 | -0.55 |      |       |                |                       |

|                          |          |       |       |       |       |       |      |       |      |            |
|--------------------------|----------|-------|-------|-------|-------|-------|------|-------|------|------------|
| <b>Developed Markets</b> |          |       |       |       |       |       |      |       |      |            |
| MSCI World Index         | 3,697.6  | -0.90 | -1.48 | -0.68 | -0.68 | 16.67 |      |       |      |            |
| U.S. (S&P 500)           | 5,797.4  | -0.92 | -1.15 | 0.61  | 0.61  | 21.54 | 4.86 | 28.21 | 1.52 | 51,906.81  |
| U.K. (FTSE 100)          | 8,258.6  | -0.58 | -1.19 | 0.26  | 0.26  | 6.79  | 1.73 | 15.09 | 3.72 | 2,144.79   |
| Japan (topix)            | 2,637.0  | -0.55 | -1.93 | -0.34 | -0.34 | 11.43 | 1.37 | 14.35 | 2.21 | 928,553.10 |
| <b>Emerging Markets</b>  |          |       |       |       |       |       |      |       |      |            |
| MSCI EM Index            | 1,141.8  | -0.03 | -1.15 | -2.48 | -2.48 | 11.53 |      |       |      |            |
| China (SSE Composite)    | 3,302.8  | 0.52  | 1.26  | -1.01 | -1.01 | 11.02 | 1.36 | 12.00 |      | 44,025.04  |
| India (Sensex)           | 80,082.0 | -0.17 | -1.41 | -5.00 | -5.00 | 10.86 | 4.28 | 23.06 | 1.15 | 158,012.43 |

| Description            | Close Price | DTD   | WTD   | MTD    | QTD    | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|--------|--------|--------|------|--------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |        |        |        |      |        |                |                       |
| Kuwait All Share Index | 6,982.7     | -0.44 | -1.38 | -2.15  | -2.15  | 2.43   | 1.44 | 14.86  | 4.01           | 42.24                 |
| Kuwait Premier Index   | 7,478.5     | -0.46 | -1.30 | -2.99  | -2.99  | 0.02   | 1.53 | 15.79  | 3.88           | 34.35                 |
| Kuwait Main Index      | 6,383.9     | -0.39 | -1.74 | 1.71   | 1.71   | 14.62  | 1.13 | 11.54  | 4.68           | 7.88                  |
| <b>Kuwait Sector</b>   |             |       |       |        |        |        |      |        |                |                       |
| Banking                | 1,711.7     | -0.39 | -1.26 | -2.36  | -2.36  | 3.90   | 1.71 | 16.62  | 3.18           | 25.74                 |
| Telecom                | 992.1       | -0.40 | -1.45 | -3.51  | -3.51  | -10.23 | 1.46 | 12.02  | 8.44           | 3.04                  |
| Industrials            | 669.3       | -1.08 | -2.29 | -7.76  | -7.76  | -26.29 | 0.72 | 10.50  | 10.45          | 2.29                  |
| Financial Services     | 1,399.4     | -0.97 | -2.10 | -0.80  | -0.80  | 15.44  | 1.16 | 12.57  | 2.90           | 4.72                  |
| Real Estate            | 1,383.9     | -0.28 | -1.06 | 0.60   | 0.60   | 14.10  | 1.07 | 15.14  | 2.06           | 2.94                  |
| Basic Materials        | 814.5       | 0.45  | -1.21 | 0.90   | 0.90   | 9.19   | 1.46 | 12.30  | 10.80          | 0.46                  |
| Health Care            | 470.7       | 0.00  | 0.00  | 0.00   | 0.00   | -2.38  | 1.57 | 17.80  | 2.23           |                       |
| Consumer Staples       | 1,028.8     | 1.01  | -0.33 | 2.49   | 2.49   | 56.22  | 2.21 | 21.00  | 2.02           | 0.31                  |
| Insurance              | 2,020.7     | 0.19  | 0.07  | -3.03  | -3.03  | -11.87 | 1.10 | 10.98  | 3.93           | 0.82                  |
| Consumer Discretionary | 1,865.8     | -0.14 | -1.73 | 3.30   | 3.30   | 16.33  |      |        |                |                       |
| Energy                 | 1,126.0     | 0.27  | 1.15  | 0.76   | 0.76   | 18.65  | 0.96 | 9.55   | 5.64           | 0.23                  |
| Technology             | 1,040.3     | 2.14  | 0.00  | -28.14 | -28.14 | 79.87  | 1.18 | 424.24 |                | 0.01                  |
| Utilities              | 376.3       | -2.05 | -2.72 | -3.38  | -3.38  | -17.34 |      |        |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

Oil prices edged higher on Thursday, recouping some of the more than 1% losses from the previous session after U.S. crude inventories rose much more than estimated. Brent crude futures rose 44 cents, or 0.59% to \$75.40.

#### Kuwait Market

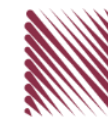
The market down by -0.44% at 6,982.7 value traded 65.5 million KD, Premier market value reached 26.6 million KD down by -0.46% at 7,478.5.

#### KSA Market

The market closed down by -0.46% at 11,901.8.

# 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) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |        |      |        |                |                       |
| NBK                    | 0.843       | -1.06 | -2.09 | -4.53 | -4.53 | -0.99  | 1.59 | 12.43  | 4.01           | 7.02                  |
| KFH                    | 0.708       | -0.28 | -0.98 | -1.12 | -1.12 | 6.30   | 2.04 | 19.30  | 2.71           | 12.12                 |
| ZAIN                   | 0.446       | -0.67 | -1.76 | -6.11 | -6.11 | -12.03 | 1.68 | 10.42  | 7.85           | 1.93                  |
| BOUBYAN BANK           | 0.537       | 0.37  | -0.56 | -5.79 | -5.79 | -5.13  | 2.17 | 25.98  | 1.41           | 2.26                  |
| AGILITY                | 0.236       | -0.42 | -1.26 | 7.76  | 7.76  | -16.67 | 0.69 | 7.64   | 8.47           | 0.63                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |        |      |        |                |                       |
| ARAMCO                 | 26.95       | -0.19 | -0.19 | -0.55 | -0.55 | -18.33 | 4.32 | 14.96  | 7.05           | 6,521.90              |
| SABIC                  | 72.40       | 0.00  | -0.14 | -3.34 | -3.34 | -13.29 | 1.33 | 112.96 | 4.56           | 217.20                |
| STC                    | 42.05       | 0.00  | -0.47 | -3.78 | -3.78 | 6.87   | 2.74 | 15.27  | 3.80           | 210.25                |
| AL-RAJHI BANK          | 85.00       | -0.93 | 3.16  | -2.52 | -2.52 | -1.73  | 2.92 | 20.49  | 2.82           | 340.00                |
| NCB                    | 34.55       | -0.86 | -0.58 | 0.73  | 0.73  | -10.61 | 1.15 | 10.56  | 5.21           | 207.30                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |        |      |        |                |                       |
| ETISALAT.AD            | 17.18       | -2.83 | -2.72 | -7.14 | -7.14 | -12.53 | 3.41 | 13.47  | 4.74           | 149.41                |
| FAB.AD                 | 13.00       | -2.11 | -3.85 | -5.39 | -5.39 | -6.88  | 1.11 | 8.90   | 5.46           | 143.62                |
| EMIRATES NBD           | 19.50       | -0.76 | -2.50 | -3.94 | -3.94 | 12.72  | 1.00 | 5.47   | 6.15           | 123.17                |
| DB ISLAMIC DB          | 6.20        | -0.16 | 0.16  | -1.59 | -1.59 | 8.39   | 1.01 | 6.80   | 7.26           | 44.89                 |
| EMAR.DU                | 8.43        | -1.75 | 0.36  | -3.33 | -3.33 | 6.44   | 0.96 | 6.20   | 5.93           | 74.51                 |
| <b>Qatar</b>           |             |       |       |       |       |        |      |        |                |                       |
| QNB                    | 17.160      | -2.78 | -3.43 | 1.24  | 1.24  | 3.81   | 1.42 | 10.43  | 3.82           | 158.50                |
| INDUSTREIS QAT         | 13.520      | 0.00  | 1.05  | 3.68  | 3.68  | 3.36   | 2.18 | 15.69  | 5.18           | 81.80                 |
| QA ISLAMIC BK          | 20.210      | -3.07 | -7.29 | -5.34 | -5.34 | -6.00  | 1.57 | 11.12  | 3.03           | 47.75                 |
| MASRAF AL RAYA         | 2.335       | -1.68 | -3.31 | -5.47 | -5.47 | -12.05 | 0.87 | 14.91  | 4.28           | 21.72                 |
| MESAIEED PETRO         | 1.574       | -2.60 | -3.97 | -3.44 | -3.44 | -11.97 | 1.21 | 22.07  | 4.45           | 19.77                 |
| <b>Oman</b>            |             |       |       |       |       |        |      |        |                |                       |
| BANK MUSCAT            | 0.265       | 0.00  | -1.12 | 5.16  | 5.16  | 0.38   | 0.84 | 10.09  | 5.85           | 1.99                  |
| OMANTEL                | 0.994       | 0.10  | 0.40  | 0.71  | 0.71  | -6.23  | 1.20 | 11.63  | 6.04           | 0.75                  |
| BANK DHOFAR            | 0.168       | 0.00  | 0.00  | 7.01  | 7.01  | 5.00   | 0.69 | 18.83  | 4.61           | 0.50                  |
| NAT BANK OF OMAN       | 0.300       | 1.69  | 1.69  | 3.45  | 3.45  | 7.14   | 0.71 | 10.41  | 2.83           | 0.49                  |
| OMINVEST               | 0.375       | -0.53 | 5.63  | 6.53  | 6.53  | -5.13  | 0.83 | 9.04   | 5.33           | 0.25                  |

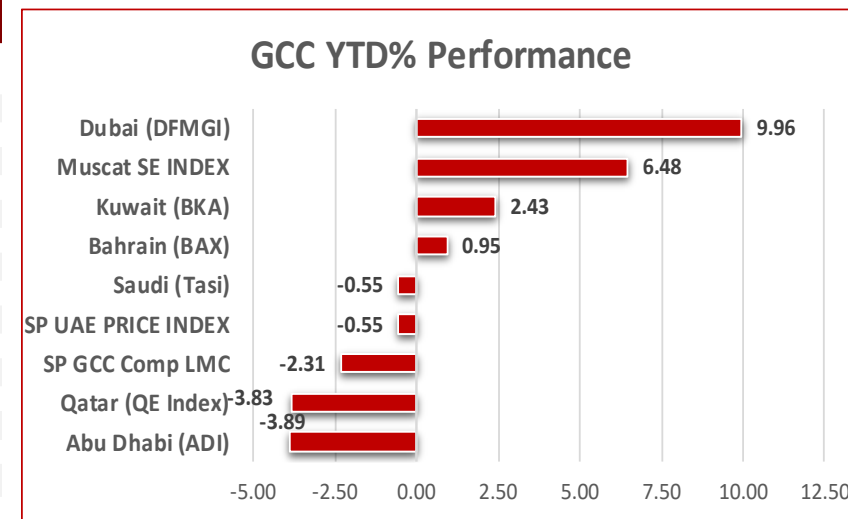
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 09-October. 24  | 24.73% | 15.67% | 0.06% | 3.73% | 7.96% | 17.61% | 12.99% | 6.03%   | 5.84% |
| 16-October. 24  | 24.73% | 15.75% | 0.06% | 3.72% | 7.91% | 17.62% | 12.98% | 6.18%   | 5.85% |

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



\* GCC Markets performance at the latest close.

### Kuwait

The market is down today by -0.44 %The leading sector bottom performance indices today are Utilities -2.05 % Industrials -1.08 % Financial services -0.97 % respectively.

### KSA

Saudi Armco have negative performance today by -0.19 %, SABIC flat performance today 0 %, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.93 %.



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