

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 26th August 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

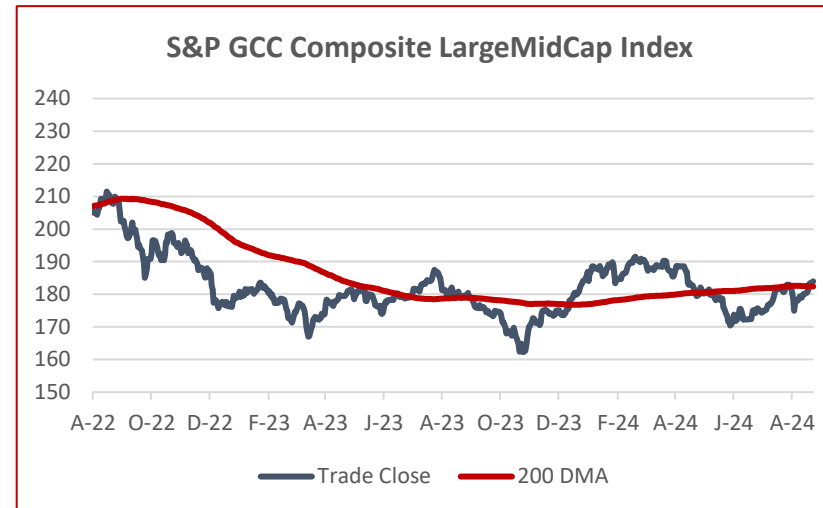


Sunday, August 25, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,262.6	0.56	0.56	1.26	4.99	2.47	3.15	23.98	3.20	10,264.92
Qatar (QE Index)	10,105.3	-0.17	-0.17	-0.48	1.38	-6.70	1.18	11.41	4.44	511.92
Dubai (DFMGI)	4,292.7	-0.38	1.17	0.58	6.52	5.74	1.50	8.35	5.63	647.68
Abu Dhabi (ADI)	9,374.0	0.03	0.95	0.37	3.46	-2.13	2.71	13.39	2.06	2,585.46
Bahrain (BAX)	1,929.7	-0.45	-0.45	-2.04	-4.73	-2.12	0.86	9.81	4.82	7.46
Muscat SE INDEX	4,687.7	0.28	0.28	0.56	0.01	3.85	0.83	9.99	5.81	7.31
SP GCC Comp LMC	184.0	0.30	0.30	0.59	5.14	-0.51	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.4	0.00	0.00	0.68	6.85	-1.03				
Developed Markets										
MSCI World Index	3,649.6	1.16	1.82	2.18	3.92	15.16				
U.S. (S&P 500)	5,634.6	1.15	1.45	2.03	3.19	18.13	4.66	26.92	1.56	49,859.70
U.K. (FTSE 100)	8,327.8	0.48	0.20	-0.48	2.00	7.69	1.78	15.07	3.67	2,168.48
Japan (topix)	2,684.7	0.50	0.23	-3.92	-4.45	13.45	1.40	14.62	2.16	945,935.89
Emerging Markets										
MSCI EM Index	1,100.7	-0.03	0.64	1.47	1.33	7.52				
China (SSE Composite)	2,854.4	0.20	-0.87	-2.87	-3.81	-4.05	1.36	12.00		44,025.04
India (Sensex)	81,086.2	0.04	0.81	-0.80	2.60	12.25	4.32	23.66	1.13	161,288.27

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,135.3	-0.40	-0.40	-1.44	2.86	4.66	1.47	15.43	3.62	43.12
Kuwait Premier Index	7,763.5	-0.48	-0.48	-1.72	2.92	3.83	1.59	16.70	3.45	35.66
Kuwait Main Index	6,065.4	0.00	0.00	-0.05	2.59	8.90	1.07	10.95	4.47	7.46
Kuwait Sector										
Banking	1,767.5	-0.20	-0.20	-2.04	3.24	7.29	1.76	17.53	3.06	26.52
Telecom	989.8	-0.45	-0.45	-0.25	0.63	-10.43	1.46	12.00	8.45	3.04
Industrials	756.5	-2.64	-2.64	-3.62	-2.08	-16.67	0.83	12.11	5.56	2.63
Financial Services	1,389.8	0.26	0.26	1.86	5.99	14.65	1.14	12.52	2.85	4.64
Real Estate	1,345.1	-0.03	-0.03	0.88	3.82	10.89	1.03	14.57	2.03	2.85
Basic Materials	793.1	0.18	0.18	5.75	4.98	6.33	1.42	13.68	11.06	0.45
Health Care	473.5	0.00	0.00	1.18	7.22	-1.79	1.58	17.91	2.21	
Consumer Staples	1,024.7	-0.40	-0.40	4.28	24.30	55.59	2.23	21.22	2.00	0.31
Insurance	1,986.2	-7.00	-7.00	-16.33	-21.17	-13.37	1.16	11.65	3.72	0.86
Consumer Discretionary	1,765.0	1.11	1.11	4.22	14.61	10.04				
Energy	1,049.7	-0.23	-0.23	-2.18	1.89	10.61	0.90	9.03	6.33	0.21
Technology	1,673.3	0.00	0.00	2.68	5.50	189.31	1.94	696.97		0.02
Utilities	402.6	0.66	0.66	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices extended gains on Monday on fears a major spillover in fighting from the Gaza conflict into the Middle East could disrupt regional oil supplies, while imminent U.S. interest rate cuts lifted the global economic and fuel demand outlook. Brent crude futures climbed 37 cents, or 0.5%, to \$79.39 a barrel by 2300 GMT while U.S. crude future were at \$75.19 a barrel, up 36 cents, or 0.5%.

Kuwait Market

The market closed down by -0.40% at 7,135.3 value traded 52.3 million KD, Premier market value reached 36.3 million KD down by -0.48% at 7,763.5.

KSA Market

The market closed up by +0.56% at 12,262.6.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.877	-0.57	-0.57	-3.09	2.45	3.00	1.68	13.14	3.86	7.34
KFH	0.718	-0.14	-0.14	-2.58	1.84	7.80	2.07	20.04	2.67	12.35
ZAIN	0.456	-0.44	-0.44	0.22	2.24	-10.06	1.72	10.65	7.68	1.98
BOUBYAN BANK	0.589	-0.17	-0.17	-0.51	4.43	4.06	2.43	29.93	1.28	2.49
AGILITY	0.255	-2.30	-2.30	-6.93	-8.60	-9.96	0.74	8.25	7.84	0.69
Saudi Arabia										
ARAMCO	27.85	0.72	0.72	0.91	-0.18	-15.61	4.47	15.46	6.82	6,737.01
SABIC	75.50	1.21	1.21	-4.19	2.30	-9.58	1.38	117.80	4.37	226.41
STC	43.70	9.94	9.94	13.51	14.70	11.06	2.85	15.87	3.66	218.41
AL-RAJHI BANK	88.70	-0.22	-0.22	3.62	10.88	2.54	3.05	21.39	2.71	354.66
NCB	36.85	-0.14	-0.14	-3.03	1.66	-4.66	1.22	11.27	4.88	221.01
Abu Dhabi										
ETISALAT.AD	17.64	0.68	5.13	7.69	9.57	-10.18	3.50	13.83	4.62	153.41
FAB.AD	13.32	-0.15	-0.60	2.15	6.90	-4.58	1.19	9.23	5.33	147.15
EMIRATES NBD	19.75	-0.50	-0.25	3.40	19.70	14.16	1.07	5.54	6.08	124.75
DB ISLAMIC DB	6.11	0.99	3.38	4.44	6.45	6.82	1.00	6.70	7.36	44.24
EMAR.DU	8.34	-1.42	2.33	-3.36	1.71	5.30	0.95	6.13	6.00	73.71
Qatar										
QNB	15.550	0.32	0.32	1.70	6.14	-5.93	1.32	9.63	4.21	143.61
INDUSTREIS QAT	12.880	-0.16	-0.16	-1.60	0.00	-1.53	2.07	14.95	5.43	77.91
QA ISLAMIC BK	19.300	-0.67	-0.67	-2.03	3.76	-10.23	1.53	10.87	3.17	45.60
MASRAF AL RAYA	2.237	0.13	0.13	-3.99	-3.95	-15.74	0.85	14.55	4.47	20.80
MESAIEED PETRO	1.622	-0.25	-0.25	-3.05	-1.40	-9.28	1.24	22.74	4.32	20.37
Oman										
BANK MUSCAT	0.259	0.39	0.39	2.78	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.998	-0.20	-0.20	-0.20	-1.67	-5.85	1.21	11.67	6.01	0.75
BANK DHOFAR	0.158	0.00	0.00	2.60	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.270	0.00	0.00	1.89	6.72	-3.57	0.64	9.37	3.15	0.44
OMINVEST	0.334	0.00	0.00	-1.76	-5.92	-15.51	0.74	8.05	5.99	0.22

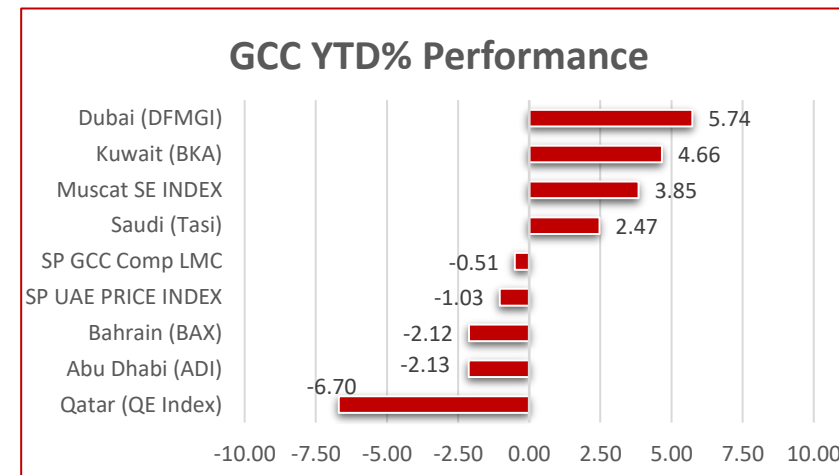
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
14-August 24	24.48%	14.56%	0.06%	3.04%	7.49%	17.58%	12.99%	5.97%	5.74%
21-August 24	24.57%	14.80%	0.06%	3.30%	7.67%	17.58%	12.97%	5.97%	5.74%

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 -0.4 %The leading sector bottom performance indices today are Insurance -7 % Industrials -2.64 % Telecom -0.45 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.72 %, SABIC have positive performance today by + 1.20%. STC has a positive performance today by + 9.94 %, Al Rajhi Bank have negative performance today by -0.22 %



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