

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

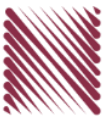
GCC DAILY MORNING BRIEF

Thursday ,25th July 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Thursday, July 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)	12,026.2	-0.62	-1.33	2.97	2.97	0.49	3.18	25.16	3.20	10,189.84
Qatar (QE Index)	10,098.4	-0.39	0.64	1.31	1.31	-6.76	1.16	11.65	4.64	510.08
Dubai (DFMGI)	4,280.3	1.01	2.38	6.21	6.21	5.43	1.49	8.65	5.66	640.61
Abu Dhabi (ADI)	9,317.8	0.15	0.91	2.84	2.84	-2.72	2.69	16.59	2.06	2,586.86
Bahrain (BAX)	1,975.1	-0.16	-0.22	-2.49	-2.49	0.18	0.88	11.16	4.53	7.64
Muscat SE INDEX	4,656.6	0.05	-0.87	-0.65	-0.65	3.16	0.83	10.14	5.87	7.25
SP GCC Comp LMC	180.9	0.15	-0.44	3.39	3.39	-2.17	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.0	0.78	1.82	5.76	5.76	-2.04				
Developed Markets										
MSCI World Index	3,524.1	0.95	-0.84	0.35	0.35	11.20				
U.S. (S&P 500)	5,459.1	1.11	-0.83	-0.03	-0.03	14.45	4.56	26.50	1.62	48,374.18
U.K. (FTSE 100)	8,285.7	1.21	1.59	1.49	1.49	7.14	1.76	14.96	3.69	2,158.10
Japan (topix)	2,699.5	-0.38	-5.64	-3.92	-3.92	14.08	1.41	14.94	2.14	950,238.96
Emerging Markets										
MSCI EM Index	1,072.3	-0.16	-1.59	-1.29	-1.29	4.74				
China (SSE Composite)	2,890.9	0.14	-3.07	-2.58	-2.58	-2.82	1.36	12.00		44,025.04
India (Sensex)	81,332.7	1.62	0.90	2.91	2.91	12.59	4.60	24.03	1.12	161,475.82
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,154.9	0.00	0.74	3.14	3.14	4.95	1.47	15.26	3.63	43.09
Kuwait Premier Index	7,800.8	-0.02	0.54	3.41	3.41	4.33	1.59	16.65	3.45	35.67
Kuwait Main Index	6,021.8	0.11	1.73	1.85	1.85	8.12	1.06	10.46	4.51	7.42
Kuwait Sector										
Banking	1,765.7	-0.11	0.59	3.14	3.14	7.18	1.75	17.37	3.07	26.44
Telecom	997.2	-0.15	0.34	1.37	1.37	-9.77	1.46	11.79	8.43	3.05
Industrials	792.5	-0.30	0.15	2.58	2.58	-12.71	0.85	11.78	5.45	2.68
Financial Services	1,361.4	0.04	0.92	3.82	3.82	12.31	1.11	12.22	2.93	4.56
Real Estate	1,343.0	-0.77	-2.00	3.66	3.66	10.73	1.03	14.46	2.03	2.85
Basic Materials	747.3	-0.43	-0.72	-1.08	-1.08	0.19	1.34	13.11	11.72	0.42
Health Care	468.0	0.00	0.00	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	1,146.0	16.87	27.95	39.01	39.01	74.01	2.49	25.43	1.79	0.35
Insurance	2,303.4	-0.41	6.12	-8.58	-8.58	0.46	1.26	11.31	3.44	0.93
Consumer Discretionary	1,691.5	1.89	4.15	9.84	9.84	5.46				
Energy	1,051.0	-1.46	-1.72	2.01	2.01	10.74	0.90	9.78	6.43	0.21
Technology	1,615.1	2.30	-3.06	1.83	1.83	179.25	1.87	267.47		0.02
Utilities	431.6	-0.61	-2.38	2.50	2.50	-5.20				

* 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 fell more than 1% on Friday, posting a third weekly decline as worries about demand in China outweigh strong economic growth in the U.S. West Texas Intermediate oil fell 3.7% this week, while Brent dropped 1.8%.

Kuwait Market

The market closed down by -0.001% at 7,154.9 value traded 39.2 million KD, Premier market value reached 30.1 million KD down by -0.02% at 7,800.8.

KSA Market

The market closed down by -0.62% at 12,026.2.

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	0.873	-0.11	0.23	1.99	1.99	2.53	1.67	13.08	3.87	7.30
KFH	0.733	0.00	1.10	3.97	3.97	10.05	2.12	20.46	2.62	12.60
ZAIN	0.455	-0.22	0.89	2.02	2.02	-10.26	1.58	10.33	7.69	1.98
BOUBYAN BANK	0.572	-0.17	-1.21	1.42	1.42	1.05	2.36	29.07	1.32	2.41
AGILITY	0.283	-0.70	-1.39	1.43	1.43	-0.08	0.76	8.31	7.07	0.76
Saudi Arabia										
ARAMCO	28.00	0.00	-1.58	0.36	0.36	-15.15	4.45	15.44	6.69	6,774.37
SABIC	77.80	-0.26	-1.64	5.42	5.42	-6.83	1.40	204.08	4.24	233.34
STC	39.15	0.13	1.16	2.76	2.76	-0.50	2.43	14.53	4.09	195.70
AL-RAJHI BANK	83.50	-1.07	-0.60	4.38	4.38	-3.47	3.08	20.81	2.75	333.92
NCB	37.10	-1.07	-3.13	2.34	2.34	-4.01	1.23	11.45	4.72	222.55
Abu Dhabi										
ETISALAT.AD	17.08	1.05	6.02	7.20	7.20	-12.12	3.44	14.37	4.63	150.08
FAB.AD	12.62	-0.16	0.00	1.12	1.12	-9.74	1.13	8.73	5.63	139.18
EMIRATES NBD	18.45	3.07	5.13	11.82	11.82	6.65	1.00	5.18	6.50	116.52
DB ISLAMIC DB	5.92	1.02	-0.67	3.14	3.14	3.50	0.97	6.49	7.60	42.86
EMAR.DU	8.73	2.46	4.55	6.46	6.46	10.23	0.97	6.80	5.73	77.15
Qatar										
QNB	15.270	0.46	3.32	4.23	4.23	-7.62	1.30	9.45	4.29	141.01
INDUSTREIS QAT	13.100	1.00	1.08	1.71	1.71	0.15	2.17	16.39	5.95	79.24
QA ISLAMIC BK	19.170	-1.03	0.10	3.06	3.06	-10.84	1.52	10.79	3.20	45.29
MASRAF AL RAYA	2.330	-0.43	0.43	0.04	0.04	-12.24	0.89	15.15	4.29	21.66
MESAIEED PETRO	1.665	-0.12	-1.30	1.22	1.22	-6.88	1.29	20.75	5.17	20.91
Oman										
BANK MUSCAT	0.252	0.00	-0.40	0.40	0.40	-4.55	0.82	9.83	6.15	1.89
OMANTEL	1.000	-0.20	0.00	-1.48	-1.48	-5.66	1.22	11.29	6.00	0.75
BANK DHOFAR	0.154	0.00	-3.75	-6.67	-6.67	-3.75	0.64	16.04	5.03	0.46
NAT BANK OF OMAN	0.260	0.00	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.340	2.41	0.00	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

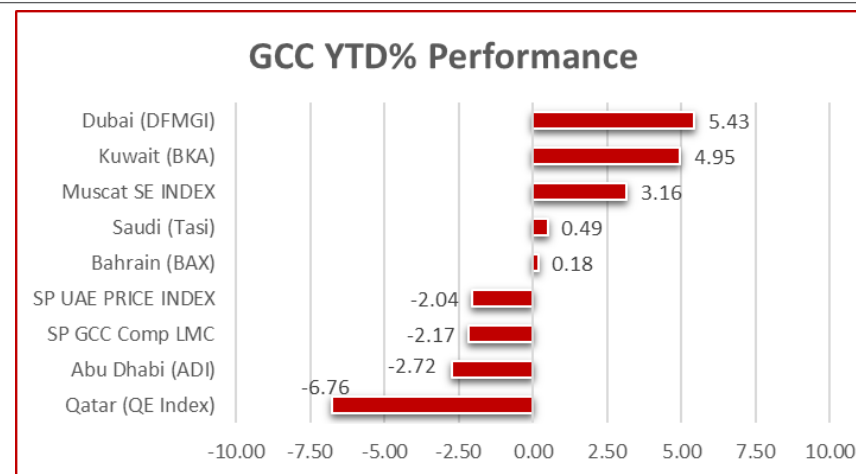
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
17-July-24	24.41%	13.88%	0.06%	2.77%	6.80%	17.61%	12.93%	6.01%	5.66%
24-July-24	24.42%	14.01%	0.06%	2.75%	6.84%	17.61%	12.93%	6.02%	5.67%

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 %The leading sector bottom performance indices today are Energy -1.46 % Real estate -0.77 % Utilities -0.61 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 0.25%, STC has a positive performance today by + 0.13 %, Al Rajhi Bank have negative performance today by -1.07 %.



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