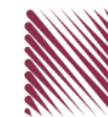


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 25th June 2024

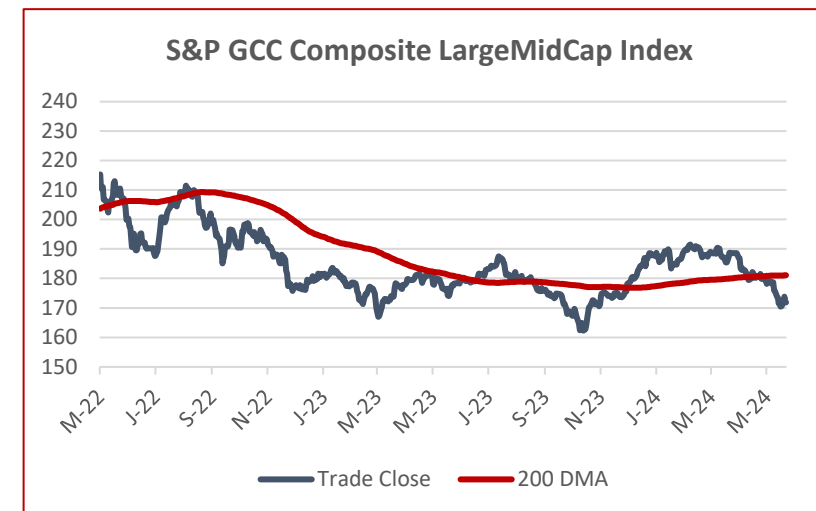




Tuesday, June 25, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,730.8	0.29	2.02	1.98	-5.41	-1.98	2.75	21.69	3.27	10,009.23
Qatar (QE Index)	9,827.4	0.57	1.29	5.45	-0.20	-9.26	1.14	11.22	4.82	494.73
Dubai (DFMGI)	3,998.8	-0.04	-0.33	0.53	-5.83	-1.50	1.39	8.16	6.04	590.19
Abu Dhabi (ADI)	9,001.8	-0.23	-0.13	1.57	-2.45	-6.01	2.60	16.19	2.13	2,519.73
Bahrain (BAX)	2,035.8	-0.10	-0.29	-0.16	-0.34	3.26	0.87	11.05	4.26	8.03
Muscat SE INDEX	4,598.3	-0.52	-1.73	-5.11	-0.81	1.87	0.79	9.84	5.95	6.34
SP GCC Comp LMC	175.2	0.12	1.60	2.70	-5.50	-5.27	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	126.1	0.24	0.38	1.68	-6.34	-8.51				
Developed Markets										
MSCI World Index	3,520.7	0.34	0.37	2.19	2.41	11.09				
U.S. (S&P 500)	5,469.3	0.39	0.09	3.63	4.09	14.66	4.53	26.73	1.61	48,348.56
U.K. (FTSE 100)	8,247.8	-0.41	0.12	-0.33	3.71	6.65	1.74	14.83	3.70	2,156.73
Japan (topix)	2,787.4	1.72	2.30	0.54	0.68	17.79	1.45	15.44	2.07	981,341.20
Emerging Markets										
MSCI EM Index	1,085.3	0.09	-0.15	3.47	4.04	6.01				
China (SSE Composite)	2,950.0	-0.44	-1.61	-4.43	-3.00	-0.84	1.36	12.00		44,025.04
India (Sensex)	78,053.5	0.92	1.09	5.53	5.98	8.05	4.97	23.18	1.13	153,310.31
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,978.2	-0.23	-0.86	-1.05	-4.76	2.36	1.43	14.98	3.67	42.05
Kuwait Premier Index	7,597.6	-0.29	-0.73	-1.11	-5.46	1.61	1.55	16.38	3.48	34.84
Kuwait Main Index	5,913.0	0.10	-1.46	-0.75	-1.21	6.16	1.03	10.24	4.60	7.21
Kuwait Sector										
Banking	1,726.5	0.07	-0.37	-0.87	-2.55	4.80	1.71	17.13	3.07	25.83
Telecom	982.8	-0.32	-1.42	-1.42	-7.72	-11.07	1.44	11.75	8.52	3.01
Industrials	764.7	-1.30	-2.37	3.11	-26.85	-15.78	0.82	11.55	5.57	2.62
Financial Services	1,299.7	-0.49	-2.36	-4.46	-3.98	7.21	1.06	11.73	3.08	4.31
Real Estate	1,312.4	-0.89	-1.17	-1.06	1.29	8.20	1.02	14.21	2.03	2.81
Basic Materials	821.9	0.51	0.20	-2.18	4.05	10.19	1.47	14.34	10.71	0.46
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	839.1	-6.09	-4.26	-4.29	8.60	27.42	1.94	19.83	2.30	0.27
Insurance	2,553.3	-0.27	-0.37	1.70	-0.55	11.36	1.40	12.62	3.10	1.03
Consumer Discretionary	1,547.7	-0.44	-0.54	-1.31	-11.65	-3.51				
Energy	1,047.8	-0.53	-0.57	-1.97	0.46	10.41	0.91	9.90	6.38	0.21
Technology	1,600.5	-3.51	-5.98	-5.98	-16.03	176.73	2.05			0.02
Utilities	418.4	-0.62	-1.24	0.00	-5.92	-8.09				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Wednesday after an industry group reported a surprise jump in U.S. stockpiles, fueling concerns about weaker-than-expected demand in the top oil consuming nation. Brent crude oil futures fell 19 cents, or 0.2%, to \$84.82 a barrel.

Kuwait Market

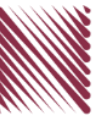
The market closed down by – 0.23% at 6,978.2 value traded 31.1 million KD, Premier market value reached 24.0 million KD down by – 0.29% at 7,597.6.

KSA Market

The market closed up by + 0.29% at 11,730.8.

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)
Blue Chip Watch										
Kuwait										
NBK	0.854	-0.47	-0.70	-0.35	-5.61	0.30	1.68	12.90	3.90	7.12
KFH	0.717	0.42	0.42	-1.78	-1.82	7.65	2.10	21.10	2.56	12.28
ZAIN	0.447	-0.22	-1.54	-0.22	-9.33	-11.83	1.56	10.15	7.83	1.94
BOUBYAN BANK	0.565	0.00	-0.53	-2.42	-3.09	-0.18	2.38	30.15	1.34	2.38
AGILITY	0.274	-2.49	-4.20	-6.48	-24.70	-3.25	0.74	8.04	7.30	0.73
Saudi Arabia										
ARAMCO	27.65	-1.25	-0.18	-4.66	-10.37	-16.21	4.39	15.25	6.78	6,689.69
SABIC	74.10	-0.54	0.82	-2.50	-5.36	-11.26	1.33	194.37	4.45	222.25
STC	37.45	1.08	2.32	4.03	-2.90	-4.82	2.32	13.90	4.27	187.21
AL-RAJHI BANK	82.00	0.86	3.80	7.75	-0.36	-5.20	3.03	20.44	2.80	327.92
NCB	35.85	-1.51	1.99	5.91	-10.82	-7.24	1.18	11.07	4.88	215.05
Abu Dhabi										
ETISALAT.AD	16.10	0.50	1.51	0.00	-12.31	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.18	1.84	3.22	5.00	-7.87	-12.75	1.13	8.46	5.83	134.54
EMIRATES NBD	16.40	0.92	0.00	5.47	-6.29	-5.20	0.96	4.78	7.32	103.58
DB ISLAMIC DB	5.73	1.24	-0.52	3.80	-1.72	0.17	0.97	6.38	7.85	41.48
EMAR.DU	7.80	-1.14	-1.27	1.83	-4.53	-1.52	0.87	6.08	6.41	68.93
Qatar										
QNB	14.480	1.05	1.97	7.26	1.76	-12.40	1.28	9.15	4.49	133.76
INDUSTREIS QAT	12.550	0.48	1.21	8.66	5.02	-4.05	2.08	15.70	6.22	75.94
QA ISLAMIC BK	18.300	1.10	2.52	6.40	-0.27	-14.88	1.51	10.45	3.96	43.25
MASRAF AL RAYA	2.320	-0.17	-0.04	0.74	0.00	-12.62	0.90	15.12	4.31	21.58
MESAIEED PETRO	1.675	0.60	-0.30	-2.62	-15.57	-6.32	1.30	20.88	5.13	21.05
Oman										
BANK MUSCAT	0.247	-0.80	-1.59	-4.63	-5.73	-6.44	0.81	9.64	6.28	1.85
OMANTEL	1.005	-0.50	-1.08	-4.92	-2.43	-5.19	1.23	11.35	5.97	0.75
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	0.253	-0.78	-1.56	-9.64	-2.69	-9.64	0.61	8.86	3.36	0.41
OMINVEST	0.360	0.00	-1.37	-6.49	-1.92	-8.93	0.76	7.82	5.56	0.24

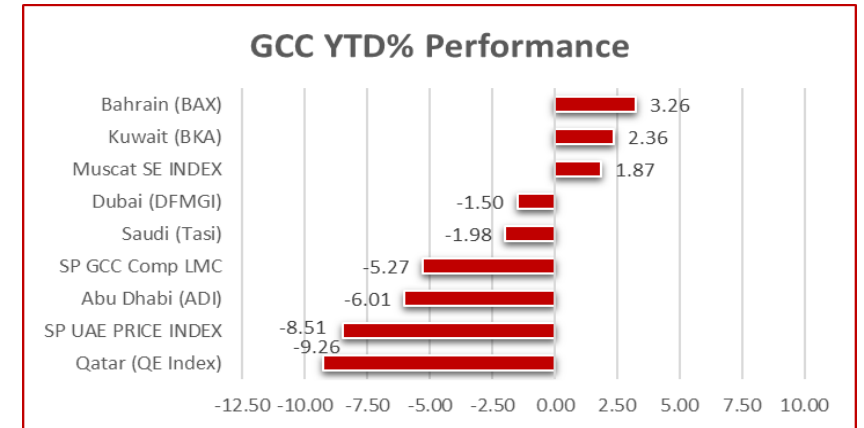
* GCC Markets performance at the latest close.

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 -0.23 %The leading sector bottom performance indices today are Consumer services -6.09 % Technology -3.51 % Industrials -1.3 % respectively.

KSA

Saudi Armco have negative performance today by -1.25 %, SABIC have negative performance today by -0.53%, STC has a positive performance today by + 1.08 %, Al Rajhi Bank has a positive performance today by + 0.86%.



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