



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 25th September 2024





Wednesday, September 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)	12,343.7	0.61	2.18	1.63	5.69	3.14	3.15	23.98	3.31	10,262.81
Qatar (QE Index)	10,542.7	0.49	0.75	3.33	5.77	-2.66	1.23	11.94	4.24	535.66
Dubai (DFMGI)	4,488.7	0.61	1.18	3.77	11.38	10.56	1.59	8.85	5.30	681.49
Abu Dhabi (ADI)	9,516.3	0.59	0.82	2.49	5.03	-0.64	2.75	17.21	2.04	2,649.74
Bahrain (BAX)	2,019.0	-0.31	-0.43	3.14	-0.32	2.41	0.91	10.52	4.52	7.85
Muscat SE INDEX	4,726.5	0.23	0.03	-0.42	0.84	4.71	0.84	10.02	5.79	7.34
SP GCC Comp LMC	187.5	0.70	1.61	2.30	7.14	1.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.9	1.02	0.89	3.71	11.91	3.66				
Developed Markets										
MSCI World Index	3,695.9	-0.17	0.52	0.95	5.24	16.62				
U.S. (S&P 500)	5,722.3	-0.19	0.35	1.31	4.79	19.97	4.76	27.34	1.56	51,003.46
U.K. (FTSE 100)	8,268.7	-0.17	0.47	-1.29	1.28	6.92	1.77	15.05	3.70	2,152.46
Japan (topix)	2,650.5	-0.23	0.31	-2.29	-5.66	12.01	1.38	14.42	2.19	935,239.00
Emerging Markets										
MSCI EM Index	1,136.8	0.42	2.74	3.35	4.65	11.04				
China (SSE Composite)	2,896.3	1.16	5.83	1.90	-2.40	-2.64	1.36	12.00		44,025.04
India (Sensex)	85,169.9	0.30	0.74	3.40	7.77	17.90	4.55	24.71	1.07	168,480.73
Kuwait										
Kuwait All Share Index	7,202.9	0.48	0.42	0.31	3.83	5.66	1.47	15.42	3.70	43.15
Kuwait Premier Index	7,794.3	0.58	0.05	-0.35	3.32	4.24	1.58	16.59	3.49	35.42
Kuwait Main Index	6,283.9	0.01	2.21	3.51	6.28	12.82	1.11	11.33	4.77	7.72
Kuwait Sector										
Banking	1,772.2	0.52	0.03	-0.37	3.51	7.57	1.75	17.45	3.10	26.39
Telecom	1,030.8	0.96	1.09	1.70	4.79	-6.73	1.50	12.32	8.23	3.12
Industrials	728.8	0.15	-2.32	-4.21	-5.67	-19.73	0.78	11.30	5.93	2.46
Financial Services	1,423.2	0.46	0.53	1.77	8.54	17.40	1.16	12.70	2.91	4.74
Real Estate	1,388.4	1.45	3.10	3.33	7.16	14.47	1.05	14.91	2.08	2.90
Basic Materials	816.2	0.58	0.35	-0.07	8.04	9.43	1.46	14.02	10.79	0.46
Health Care	472.3	4.88	3.71	6.98	6.93	-2.05	1.51	17.03	2.33	
Consumer Staples	998.7	-0.07	0.72	0.69	21.14	51.64	2.17	20.61	2.06	0.30
Insurance	2,164.2	-4.04	9.69	10.33	-14.11	-5.61	1.23	12.27	3.52	0.91
Consumer Discretionary	1,789.4	-0.21	-0.37	0.90	16.20	11.57				
Energy	1,101.4	-0.88	-0.93	0.21	6.91	16.06	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	0.00	1.33	-0.65	-5.00	-12.14				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were little changed on Thursday after falling in the previous session as signs of higher fuel demand and falling stockpiles in the U.S., the world's biggest oil user, offset concerns over demand elsewhere, particularly in China. Brent crude futures were up 9 cents, or 0.12%, to \$73.55 a barrel.

Kuwait Market

The market closed up by +0.48% at 7,202.9 value traded 76.8 million KD, Premier market value reached 45.2 million KD up by +0.58% at 7,794.3.

KSA Market

The market closed positive by +0.61% at 12,343.7.

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	0.889	0.45	1.14	1.25	3.86	4.41	1.70	13.32	3.80	7.41
KFH	0.723	0.70	-0.14	-0.55	2.55	8.55	2.09	20.18	2.65	12.39
ZAIN	0.477	1.06	0.85	2.14	6.95	-5.92	1.80	11.14	7.34	2.07
BOUBYAN BANK	0.576	0.70	-2.04	-2.04	2.13	1.76	2.38	29.27	1.31	2.42
AGILITY	0.234	0.43	-4.88	-8.59	-16.13	-17.38	0.68	7.57	8.55	0.63
Saudi Arabia										
ARAMCO	27.75	0.73	1.28	-0.72	-0.54	-15.91	4.45	15.40	6.85	6,716.04
SABIC	75.40	-0.40	3.15	0.80	2.17	-9.70	1.38	117.64	4.38	226.22
STC	44.00	1.03	0.80	2.33	15.49	11.83	2.87	15.98	3.64	220.02
AL-RAJHI BANK	90.70	0.89	0.89	2.95	13.38	4.86	3.12	21.87	2.65	362.83
NCB	35.80	-0.56	1.70	2.29	-1.24	-7.37	1.19	10.95	5.03	214.82
Abu Dhabi										
ETISALAT.AD	19.00	0.53	2.04	4.74	18.01	-3.26	3.77	14.90	4.29	165.24
FAB.AD	13.90	1.91	2.36	3.73	11.56	-0.43	1.25	9.63	5.11	153.57
EMIRATES NBD	20.85	2.21	2.46	5.84	26.36	20.52	1.13	5.85	5.76	131.70
DB ISLAMIC DB	6.32	0.16	0.64	2.43	10.10	10.49	1.03	6.93	7.12	45.76
EMAR.DU	8.71	0.46	-0.23	3.20	6.22	9.97	1.00	6.40	5.74	76.99
Qatar										
QNB	16.850	1.32	0.30	6.38	15.02	1.94	1.43	10.43	3.89	155.63
INDUSTREIS QAT	12.930	0.39	-0.46	0.23	0.39	-1.15	2.08	15.01	5.41	78.23
QA ISLAMIC BK	20.700	0.10	2.17	5.94	11.29	-3.72	1.65	11.66	2.96	48.91
MASRAF AL RAYA	2.450	1.11	0.86	6.52	5.20	-7.72	0.93	15.93	4.08	22.79
MESAIEED PETRO	1.649	0.86	0.55	-0.06	0.24	-7.77	1.26	23.12	4.24	20.72
Oman										
BANK MUSCAT	0.256	-0.78	-1.16	-0.78	1.99	-3.03	0.82	9.75	6.05	1.92
OMANTEL	0.993	-0.70	-0.20	-1.59	-2.17	-6.32	1.20	11.61	6.04	0.74
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	0.298	6.43	6.81	10.37	17.79	6.43	0.71	10.34	2.85	0.48
OMINVEST	0.357	-0.28	-3.25	8.18	0.56	-9.69	0.79	8.61	5.60	0.24

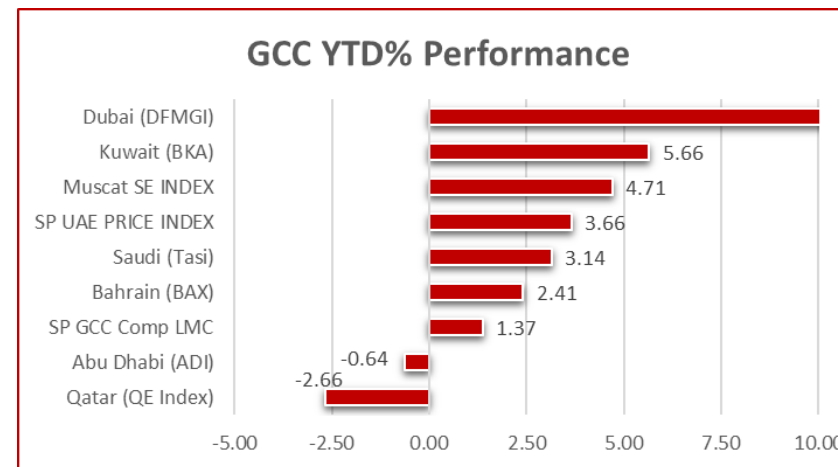
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%
25-Sept. 24	24.33%	15.45%	0.06%	3.67%	7.93%	17.59%	13.03%	5.98%	5.79%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



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Kuwait

The market is up today by + 0.48 %The leading sector best performance indices today are Health care 4.88 % Real estate 1.45 % Telecom 0.96 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.73 %, SABIC have negative performance today by -0.39%, STC has a positive performance today by + 1.03 %, Al Rajhi Bank has a positive performance today by + 0.89%.



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