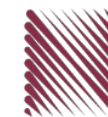


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 26th August 2024





Monday, August 26, 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)	12,261.2	-0.01	0.55	1.25	4.98	2.45	3.11	23.70	3.21	10,268.15
Qatar (QE Index)	10,222.8	1.16	0.99	0.68	2.56	-5.61	1.19	11.55	4.38	518.30
Dubai (DFMGI)	4,324.8	0.75	0.75	1.33	7.31	6.53	1.51	8.40	5.60	651.78
Abu Dhabi (ADI)	9,356.4	-0.19	-0.19	0.19	3.26	-2.31	2.70	13.37	2.07	2,581.57
Bahrain (BAX)	1,928.6	-0.06	-0.51	-2.10	-4.78	-2.18	0.86	9.82	4.82	7.45
Muscat SE INDEX	4,697.3	0.20	0.49	0.76	0.21	4.06	0.84	10.01	5.79	7.32
SP GCC Comp LMC	184.4	0.23	0.53	0.82	5.38	-0.28	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.0	0.40	0.40	1.09	7.27	-0.63				
Developed Markets										
MSCI World Index	3,641.8	-0.21	-0.21	1.97	3.70	14.91				
U.S. (S&P 500)	5,616.8	-0.32	-0.32	1.71	2.86	17.76	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	2,168.46
Japan (topix)	2,661.4	-0.87	-0.87	-4.75	-5.28	12.47	1.39	14.49	2.18	938,609.16
Emerging Markets										
MSCI EM Index	1,104.3	0.33	0.33	1.80	1.66	7.87				
China (SSE Composite)	2,855.5	0.04	0.04	-2.83	-3.77	-4.01	1.36	12.00		44,025.04
India (Sensex)	81,698.1	0.75	0.75	-0.05	3.37	13.09	4.35	23.84	1.12	162,531.42
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,161.9	0.37	-0.03	-1.07	3.24	5.05	1.46	15.35	3.64	42.95
Kuwait Premier Index	7,798.1	0.45	-0.04	-1.28	3.37	4.29	1.58	16.62	3.46	35.49
Kuwait Main Index	6,066.7	0.02	0.02	-0.03	2.61	8.92	1.07	10.91	4.47	7.46
Kuwait Sector										
Banking	1,773.9	0.36	0.16	-1.69	3.61	7.67	1.75	17.49	3.07	26.47
Telecom	993.6	0.38	-0.07	0.13	1.01	-10.09	1.45	11.95	8.49	3.02
Industrials	757.4	0.11	-2.53	-3.51	-1.97	-16.58	0.81	11.79	5.71	2.56
Financial Services	1,394.8	0.36	0.62	2.22	6.37	15.06	1.14	12.43	2.84	4.65
Real Estate	1,351.7	0.50	0.46	1.38	4.33	11.44	1.03	14.62	2.03	2.85
Basic Materials	804.4	1.42	1.60	7.25	6.47	7.84	1.43	13.70	11.04	0.45
Health Care	473.5	0.00	0.00	1.18	7.22	-1.79	1.58	17.91	2.21	
Consumer Staples	1,009.0	-1.54	-1.93	2.68	22.39	53.20	2.22	21.13	2.01	0.31
Insurance	1,983.5	-0.14	-7.12	-16.44	-21.28	-13.49	1.08	10.84	3.99	0.80
Consumer Discretionary	1,786.2	1.20	2.33	5.47	15.99	11.36				
Energy	1,072.1	2.13	1.90	-0.10	4.06	12.97	0.90	9.01	6.03	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	0.00	0.66	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices paused their recent advances, receding in Asian trading on Tuesday after surging more than 7% in the previous three sessions on supply concerns prompted by fears of a wider Middle East conflict and the shutdown of Libyan oil fields. Brent crude futures fell 32 cents, or 0.39%, to \$81.11 a barrel.

Kuwait Market

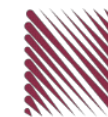
The market closed up by +0.37% at 7,161.9 value traded 57.2 million KD, Premier market value reached 40.8 million KD up by +0.45% at 7,798.1.

KSA Market

The market closed down by -0.01% at 12,261.2.

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	0.883	0.68	0.11	-2.43	3.15	3.71	1.69	13.23	3.83	7.41
KFH	0.720	0.28	0.14	-2.31	2.13	8.10	2.08	20.09	2.66	12.41
ZAIN	0.459	0.66	0.22	0.88	2.91	-9.47	1.73	10.72	7.63	2.00
BOUBYAN BANK	0.592	0.51	0.34	0.00	4.96	4.59	2.44	30.08	1.27	2.51
AGILITY	0.256	0.39	-1.92	-6.57	-8.24	-9.61	0.75	8.28	7.81	0.69
Saudi Arabia										
ARAMCO	27.95	0.36	1.08	1.27	0.18	-15.30	4.48	15.51	6.80	6,761.20
SABIC	76.50	1.32	2.55	-2.92	3.66	-8.38	1.40	119.36	4.31	229.41
STC	43.60	-0.23	9.69	13.25	14.44	10.81	2.85	15.83	3.67	217.91
AL-RAJHI BANK	88.60	-0.11	-0.34	3.50	10.75	2.43	3.04	21.36	2.71	354.26
NCB	36.60	-0.68	-0.81	-3.68	0.97	-5.30	1.21	11.19	4.92	219.51
Abu Dhabi										
ETISALAT.AD	17.66	0.11	0.11	7.81	9.69	-10.08	3.50	13.85	4.61	153.56
FAB.AD	13.24	-0.60	-0.60	1.53	6.26	-5.16	1.19	9.17	5.36	146.25
EMIRATES NBD	19.75	0.00	0.00	3.40	19.70	14.16	1.07	5.54	6.08	124.74
DB ISLAMIC DB	6.16	0.82	0.82	5.30	7.32	7.69	1.01	6.75	7.31	44.60
EMAR.DU	8.47	1.56	1.56	-1.85	3.29	6.94	0.97	6.23	5.90	74.85
Qatar										
QNB	15.860	1.99	2.32	3.73	8.26	-4.05	1.35	9.82	4.13	146.47
INDUSTREIS QAT	13.000	0.93	0.78	-0.69	0.93	-0.61	2.09	15.09	5.38	78.64
QA ISLAMIC BK	19.480	0.93	0.26	-1.12	4.73	-9.40	1.55	10.97	3.14	46.02
MASRAF AL RAYA	2.287	2.24	2.37	-1.85	-1.80	-13.86	0.87	14.87	4.37	21.27
MESAIEED PETRO	1.635	0.80	0.55	-2.27	-0.61	-8.56	1.25	22.92	4.28	20.54
Oman										
BANK MUSCAT	0.26	0.39	0.78	3.17	3.59	-1.52	0.83	9.90	5.96	1.96
OMANTEL	1.000	0.20	0.00	0.00	-1.48	-5.66	1.21	11.70	6.00	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	0.335	0.30	0.30	-1.47	-5.63	-15.25	0.74	8.08	5.97	0.22

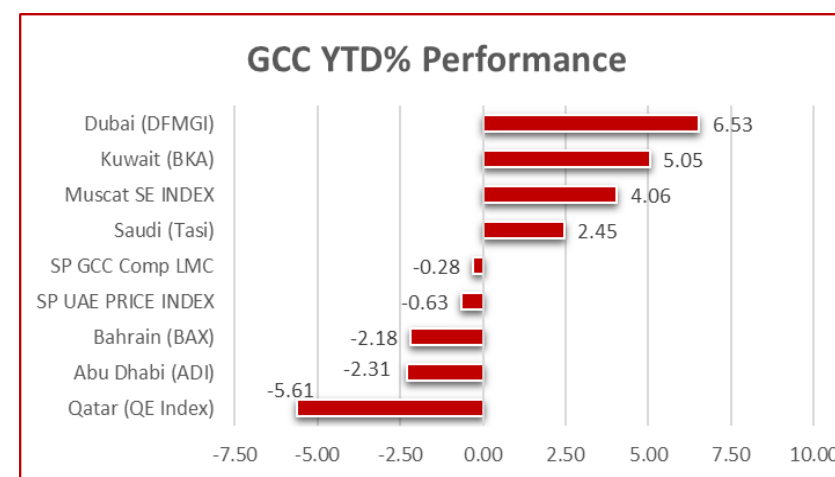
* GCC Markets performance at the latest close.

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, Boursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.37 %The leading sector best performance indices today are Energy 2.13 % Basic materials 1.42 % Consumer Disc 1.2 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.36 %, SABIC have positive performance today by + 1.32%, STC have negative performance today by -0.23 %, Al Rajhi Bank have negative performance today by -0.11 %.



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