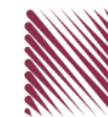


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 26th June 2024

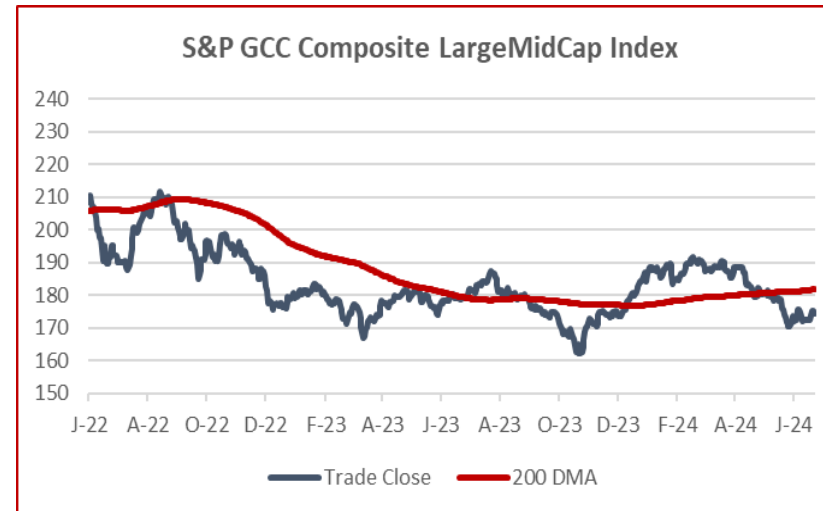




Wednesday, June 26, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,656.4	-0.63	1.37	1.33	-6.01	-2.60	2.74	21.59	3.30	9,995.62
Qatar (QE Index)	9,871.0	0.44	1.74	5.92	0.24	-8.86	1.14	11.27	4.80	496.92
Dubai (DFMGI)	4,006.1	0.18	-0.15	0.71	-5.66	-1.32	1.39	8.20	6.01	594.47
Abu Dhabi (ADI)	8,965.8	-0.40	-0.52	1.16	-2.84	-6.39	2.59	16.13	2.14	2,507.58
Bahrain (BAX)	2,033.9	-0.09	-0.38	-0.25	-0.43	3.17	0.87	11.04	4.27	8.02
Muscat SE INDEX	4,673.5	1.64	-0.13	-3.55	0.82	3.53	0.80	9.99	5.87	6.44
SP GCC Comp LMC	174.3	-0.54	1.06	2.15	-6.01	-5.78	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	126.0	-0.08	0.29	1.59	-6.42	-8.58				
Developed Markets										
MSCI World Index	3,520.2	-0.01	0.35	2.18	2.40	11.08				
U.S. (S&P 500)	5,477.9	0.16	0.24	3.80	4.25	14.84	4.54	26.81	1.60	48,446.29
U.K. (FTSE 100)	8,225.3	-0.27	-0.15	-0.60	3.43	6.36	1.73	14.79	3.71	2,150.76
Japan (topix)	2,803.0	0.56	2.87	1.10	1.24	18.45	1.46	15.53	2.06	986,721.79
Emerging Markets										
MSCI EM Index	1,086.2	0.08	-0.07	3.55	4.12	6.10				
China (SSE Composite)	2,972.5	0.76	-0.85	-3.70	-2.26	-0.08	1.36	12.00		44,025.04
India (Sensex)	78,674.3	0.80	1.90	6.37	6.82	8.91	4.98	23.38	1.12	154,740.39
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,927.1	-0.73	-1.58	-1.77	-5.46	1.61	1.43	14.95	3.68	41.99
Kuwait Premier Index	7,533.2	-0.85	-1.57	-1.95	-6.27	0.75	1.55	16.33	3.49	34.74
Kuwait Main Index	5,903.0	-0.17	-1.63	-0.92	-1.38	5.98	1.03	10.25	4.63	7.25
Kuwait Sector										
Banking	1,709.7	-0.97	-1.33	-1.83	-3.49	3.78	1.71	17.14	3.07	25.85
Telecom	986.2	0.34	-1.08	-1.08	-7.41	-10.76	1.44	11.72	8.55	3.00
Industrials	756.2	-1.10	-3.44	1.98	-27.66	-16.71	0.81	11.38	5.65	2.59
Financial Services	1,295.1	-0.35	-2.71	-4.80	-4.32	6.84	1.05	11.68	3.11	4.33
Real Estate	1,299.5	-0.98	-2.14	-2.03	0.30	7.14	1.01	14.07	2.09	2.79
Basic Materials	823.7	0.22	0.42	-1.96	4.28	10.43	1.48	14.41	10.66	0.46
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	826.8	-1.47	-5.66	-5.70	7.01	25.55	1.82	18.62	2.45	0.26
Insurance	2,549.5	-0.15	-0.52	1.55	-0.70	11.20	1.39	12.59	3.11	1.03
Consumer Discretionary	1,561.4	0.89	0.34	-0.44	-10.86	-2.65				
Energy	1,049.0	0.11	-0.45	-1.86	0.58	10.54	0.91	9.83	6.42	0.21
Technology	1,571.4	-1.82	-7.69	-7.69	-17.56	171.70	1.98			0.02
Utilities	415.8	-0.63	-1.86	-0.63	-6.51	-8.67				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

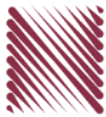
Oil prices slid in early Asian trade on Thursday as a surprise build in U.S. stockpiles fueled fears about slow demand from the top oil consumer, though worries a potential expansion of the Gaza war may disrupt Middle East supplies capped declines. Brent crude oil futures fell 30 cents, or 0.4%, to \$84.17 a barrel.

Kuwait Market

The market closed down by – 0.73% at 6,927.1 value traded 44.5 million KD, Premier market value reached 39.4 million KD down by – 0.85% at 7,533.2.

KSA Market

The market closed down by – 0.63% at 11,656.4.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.850	-0.47	-1.16	-0.82	-6.05	-0.17	1.67	12.84	3.92	7.09
KFH	0.706	-1.53	-1.12	-3.29	-3.32	6.00	2.07	20.78	2.60	12.09
ZAIN	0.448	0.22	-1.32	0.00	-9.13	-11.64	1.56	10.17	7.81	1.94
BOUBYAN BANK	0.561	-0.71	-1.23	-3.11	-3.78	-0.89	2.36	29.94	1.35	2.36
AGILITY	0.269	-1.82	-5.94	-8.19	-26.08	-5.02	0.72	7.90	7.43	0.72
Saudi Arabia										
ARAMCO	27.70	0.18	0.00	-4.48	-10.21	-16.06	4.40	15.28	6.76	6,701.08
SABIC	73.60	-0.67	0.14	-3.16	-6.00	-11.86	1.32	193.06	4.48	220.72
STC	37.10	-0.93	1.37	3.06	-3.80	-5.71	2.30	13.77	4.31	185.44
AL-RAJHI BANK	81.10	-1.10	2.66	6.57	-1.46	-6.24	3.00	20.22	2.84	324.29
NCB	35.90	0.14	2.13	6.06	-10.70	-7.12	1.19	11.08	4.87	215.33
Abu Dhabi										
ETISALAT.AD	15.86	-1.49	0.00	-1.49	-13.62	-19.25	3.17	13.20	5.04	137.93
FAB.AD	12.10	-0.66	2.54	4.31	-8.47	-13.32	1.12	8.41	5.87	133.67
EMIRATES NBD	16.45	0.30	0.30	5.79	-6.00	-4.91	0.96	4.79	7.29	103.91
DB ISLAMIC DB	5.66	-1.22	-1.74	2.54	-2.92	-1.05	0.96	6.30	7.95	40.98
EMAR.DU	7.97	2.18	0.89	4.05	-2.45	0.63	0.89	6.21	6.27	70.44
Qatar										
QNB	14.550	0.48	2.46	7.78	2.25	-11.98	1.29	9.19	4.47	134.41
INDUSTREIS QAT	12.800	1.99	3.23	10.82	7.11	-2.14	2.12	16.02	6.09	77.45
QA ISLAMIC BK	18.480	0.98	3.53	7.44	0.71	-14.05	1.53	10.56	3.92	43.67
MASRAF AL RAYA	2.290	-1.29	-1.34	-0.56	-1.29	-13.75	0.89	14.93	4.37	21.30
MESAIEED PETRO	1.643	-1.91	-2.20	-4.48	-17.19	-8.11	1.27	20.48	5.23	20.64
Oman										
BANK MUSCAT	0.25	1.21	-0.40	-3.47	-4.58	-5.30	0.82	9.75	6.20	1.88
OMANTEL	0.998	-0.70	-1.77	-5.58	-3.11	-5.85	1.22	11.27	6.01	0.75
BANK DHOFAR	0.165	7.84	7.84	5.10	3.13	3.13	0.69	16.37	4.70	0.49
NAT BANK OF OMAN	0.253	0.00	-1.56	-9.64	-2.69	-9.64	0.61	8.86	3.36	0.41
OMINVEST	0.355	-1.39	-2.74	-7.79	-3.29	-10.19	0.75	7.71	5.63	0.24

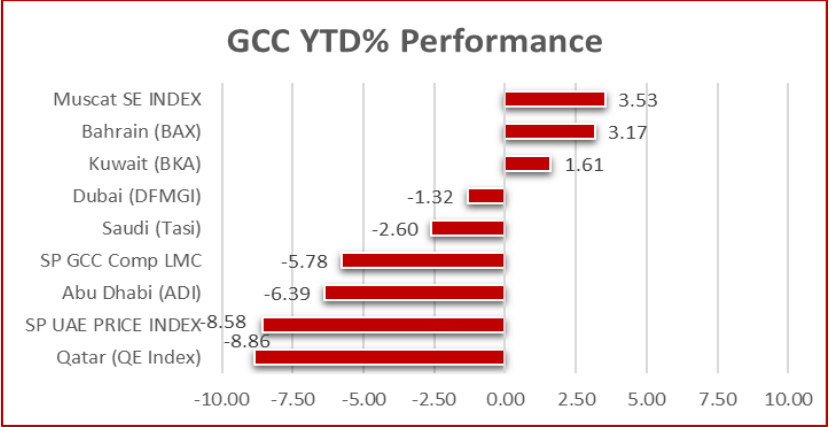
* GCC Markets performance at the latest close.

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 -0.73 %The leading sector bottom performance indices today are Technology -1.82 % Consumer services -1.47 % Industrials -1.1 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC have negative performance today by -0.67%, STC have negative performance today by -0.93 %, Al Rajhi Bank have negative performance today by -1.1 %.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw