



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 29th September 2024





Thursday, September 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)	12,374.3	0.25	2.43	1.89	5.95	3.40	3.13	23.85	3.31	10,249.53
Qatar (QE Index)	10,581.7	0.37	1.12	3.71	6.16	-2.30	1.23	11.98	4.22	537.65
Dubai (DFMGI)	4,521.3	-0.12	1.91	4.53	12.19	11.37	1.60	8.90	5.27	686.94
Abu Dhabi (ADI)	9,469.5	-0.47	0.33	1.99	4.51	-1.13	2.73	17.11	2.05	2,637.03
Bahrain (BAX)	2,013.9	-0.25	-0.68	2.88	-0.57	2.15	0.91	10.48	4.54	7.83
Muscat SE INDEX	4,701.9	-0.52	-0.49	-0.94	0.31	4.16	0.83	9.98	5.81	7.31
SP GCC Comp LMC	187.6	-0.11	1.65	2.34	7.19	1.42	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.5	-0.51	0.62	3.43	11.61	3.38				
Developed Markets										
MSCI World Index	3,726.8	0.17	1.36	1.79	6.12	17.60				
U.S. (S&P 500)	5,738.2	-0.13	0.62	1.59	5.09	20.30	4.76	27.40	1.55	51,043.26
U.K. (FTSE 100)	8,320.8	0.43	1.10	-0.67	1.92	7.60	1.78	15.12	3.68	2,167.19
Japan (topix)	2,740.9	0.73	3.73	1.04	-2.44	15.83	1.43	14.91	2.12	966,478.69
Emerging Markets										
MSCI EM Index	1,174.5	0.96	6.15	6.78	8.13	14.73				
China (SSE Composite)	3,087.5	2.88	12.81	8.63	4.05	3.78	1.36	12.00		44,025.04
India (Sensex)	85,571.9	-0.31	1.22	3.89	8.27	18.45	4.58	24.82	1.06	169,867.44
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,197.1	-0.08	0.34	0.22	3.75	5.57	1.48	15.48	3.69	43.32
Kuwait Premier Index	7,789.8	-0.06	-0.01	-0.41	3.26	4.18	1.59	16.67	3.47	35.61
Kuwait Main Index	6,271.9	-0.19	2.01	3.31	6.08	12.61	1.10	11.29	4.78	7.71
Kuwait Sector										
Banking	1,770.2	-0.11	-0.08	-0.48	3.40	7.45	1.76	17.52	3.09	26.50
Telecom	1,044.9	1.36	2.47	3.08	6.22	-5.45	1.53	12.61	8.04	3.19
Industrials	730.2	0.20	-2.13	-4.02	-5.49	-19.57	0.78	11.33	5.91	2.47
Financial Services	1,424.4	0.08	0.62	1.85	8.62	17.50	1.17	12.74	2.89	4.76
Real Estate	1,390.7	0.17	3.27	3.50	7.34	14.66	1.07	15.20	2.04	2.95
Basic Materials	810.9	-0.65	-0.30	-0.72	7.34	8.71	1.46	14.01	10.80	0.46
Health Care	472.3	0.00	3.71	6.98	6.93	-2.05	1.58	17.86	2.22	
Consumer Staples	998.7	0.00	0.72	0.69	21.14	51.64	2.17	20.59	2.06	0.30
Insurance	1,988.8	-8.11	0.80	1.38	-21.07	-13.26	1.08	10.77	3.99	0.80
Consumer Discretionary	1,805.0	0.87	0.50	1.78	17.21	12.53				
Energy	1,115.7	1.30	0.35	1.51	8.29	17.56	0.95	9.48	5.68	0.23
Technology	1,462.3	-6.08	-5.63	-8.64	-7.80	152.83	1.70	609.09		0.02
Utilities	397.4	-0.66	0.67	-1.31	-5.62	-12.72				

* 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 oil on Friday posted a weekly loss, as the prospect of growing oil supplies from Saudi Arabia overshadowed China's efforts to stimulate its economy. Brent November contract: \$71.98 per barrel, off 38 cents, or 0.53%. Year to date, the global benchmark is down more than 6%.

Kuwait Market

The market closed down by -0.08% at 7,197.1 value traded 70.2 million KD, Premier market value reached 35.5 million KD down by -0.06% at 7,789.8.

KSA Market

The market closed positive by +0.25% at 12,374.3.



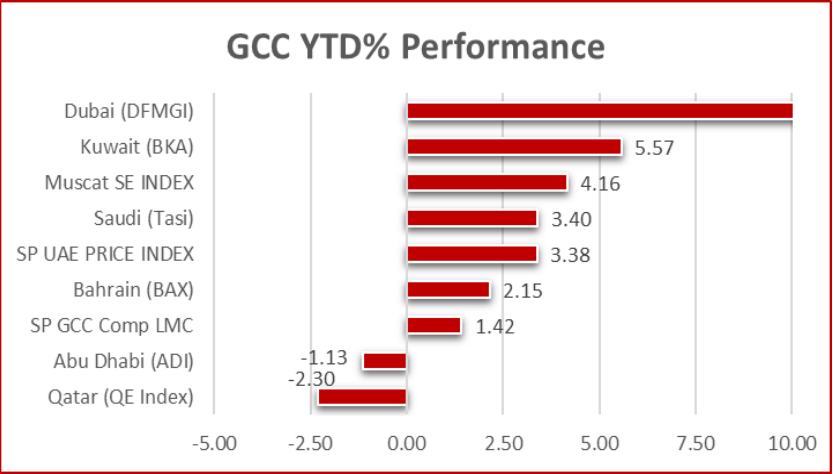
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.889	0.00	1.14	1.25	3.86	4.41	1.70	13.32	3.80	7.40
KFH	0.723	0.00	-0.14	-0.55	2.55	8.55	2.09	20.18	2.65	12.37
ZAIN	0.480	0.63	1.48	2.78	7.62	-5.33	1.81	11.21	7.29	2.08
BOUBYAN BANK	0.576	0.00	-2.04	-2.04	2.13	1.76	2.38	29.27	1.31	2.42
AGILITY	0.229	-2.14	-6.91	-10.55	-17.92	-19.14	0.67	7.41	8.73	0.61
Saudi Arabia										
ARAMCO	27.60	-0.54	0.73	-1.25	-1.08	-16.36	4.43	15.32	6.88	6,679.20
SABIC	74.90	-0.66	2.46	0.13	1.49	-10.30	1.37	116.86	4.41	224.70
STC	44.10	0.23	1.03	2.56	15.75	12.08	2.88	16.01	3.63	220.50
AL-RAJHI BANK	89.60	-1.21	-0.33	1.70	12.00	3.58	3.08	21.60	2.68	358.40
NCB	35.65	-0.42	1.28	1.86	-1.66	-7.76	1.18	10.90	5.05	213.90
Abu Dhabi										
ETISALAT.AD	18.94	-0.95	0.75	3.42	16.52	-4.48	3.76	14.85	4.34	163.15
FAB.AD	13.96	-1.15	1.62	2.99	10.75	-1.15	1.25	9.67	5.14	152.46
EMIRATES NBD	20.75	-0.72	1.97	5.33	25.76	19.94	1.13	5.86	5.78	131.07
DB ISLAMIC DB	6.36	-0.31	1.27	3.08	10.80	11.19	1.04	6.99	7.08	46.05
EMAR.DU	8.70	0.00	-0.34	3.08	6.10	9.85	0.99	6.40	5.75	76.90
Qatar										
QNB	16.890	0.24	0.54	6.63	15.29	2.18	1.43	10.46	3.88	156.00
INDUSTREIS QAT	12.990	0.46	0.00	0.70	0.85	-0.69	2.09	15.08	5.39	78.59
QA ISLAMIC BK	20.730	0.14	2.32	6.09	11.45	-3.58	1.65	11.67	2.95	48.98
MASRAF AL RAYA	2.464	0.57	1.44	7.13	5.80	-7.19	0.94	16.02	4.06	22.92
MESAIEED PETRO	1.653	0.24	0.79	0.18	0.49	-7.55	1.27	23.17	4.23	20.77
Oman										
BANK MUSCAT	0.257	0.39	-0.77	-0.39	2.39	-2.65	0.82	9.79	6.03	1.93
OMANTEL	0.980	-1.31	-1.51	-2.87	-3.45	-7.55	1.18	11.46	6.12	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	0.290	-2.68	3.94	7.41	14.62	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.352	-1.40	-4.61	6.67	-0.85	-10.95	0.78	8.49	5.68	0.24

* GCC Markets performance at the latest close.

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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Kuwait

The market is down today by -0.08 %The leading sector bottom performance indices today are Insurance -8.11 % Technology -6.08 % Utilities -0.66 % respectively

KSA

Saudi Armco have negative performance today by -0.54 %, SABIC have negative performance today by -0.66%, STC has a positive performance today by + 0.23 %, Al Rajhi Bank have negative performance today by -1.21 %.



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