



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 27th August 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (in LC Bn)
GCC Markets										
Saudi (Tasi)	12,182.2	-0.64	-0.10	0.60	4.30	1.79	3.08	23.43	3.23	10,220.14
Qatar (QE Index)	10,188.6	-0.33	0.65	0.34	2.22	-5.93	1.19	11.51	4.40	516.62
Dubai (DFMGI)	4,343.2	0.43	1.18	1.76	7.77	6.98	1.52	8.46	5.56	654.55
Abu Dhabi (ADI)	9,334.0	-0.24	-0.43	-0.05	3.02	-2.55	2.69	13.34	2.07	2,576.34
Bahrain (BAX)	1,928.2	-0.02	-0.53	-2.12	-4.80	-2.20	0.86	9.81	4.82	7.45
Muscat SE INDEX	4,691.1	-0.13	0.36	0.63	0.08	3.92	0.83	9.98	5.80	7.31
SP GCC Comp LMC	183.7	-0.40	0.12	0.41	4.96	-0.69	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.2	0.20	0.60	1.29	7.49	-0.43				
Developed Markets										
MSCI World Index	3,647.3	0.15	-0.06	2.12	3.86	15.09				
U.S. (S&P 500)	5,625.8	0.16	-0.16	1.87	3.03	17.95	4.64	26.84	1.56	49,707.20
U.K. (FTSE 100)	8,345.5	0.21	0.21	-0.27	2.22	7.92	1.79	15.10	3.66	2,173.05
Japan (topix)	2,680.8	0.73	-0.15	-4.06	-4.59	13.29	1.40	14.60	2.17	945,970.24
Emerging Markets										
MSCI EM Index	1,099.8	-0.41	-0.08	1.38	1.24	7.43				
China (SSE Composite)	2,848.7	-0.24	-0.20	-3.06	-4.00	-4.24	1.36	12.00		44,025.04
India (Sensex)	81,711.8	0.02	0.77	-0.04	3.39	13.11	4.36	23.85	1.12	162,366.18
Kuwait										
Kuwait All Share Index	7,188.2	0.37	0.34	-0.71	3.62	5.44	1.47	15.41	3.62	43.11
Kuwait Premier Index	7,839.4	0.53	0.49	-0.76	3.92	4.85	1.59	16.69	3.45	35.65
Kuwait Main Index	6,041.0	-0.42	-0.41	-0.46	2.17	8.46	1.07	10.92	4.47	7.46
Kuwait Sector										
Banking	1,777.8	0.22	0.37	-1.47	3.84	7.91	1.76	17.56	3.06	26.56
Telecom	1,011.2	1.77	1.70	1.90	2.80	-8.50	1.46	11.99	8.46	3.04
Industrials	764.5	0.93	-1.62	-2.61	-1.05	-15.80	0.81	11.80	5.70	2.56
Financial Services	1,401.9	0.51	1.13	2.74	6.91	15.64	1.14	12.48	2.83	4.67
Real Estate	1,345.1	-0.49	-0.03	0.88	3.83	10.90	1.04	14.71	2.02	2.86
Basic Materials	804.5	0.01	1.62	7.26	6.48	7.85	1.45	13.90	10.89	0.45
Health Care	441.4	-6.78	-6.78	-5.68	-0.05	-8.45	1.58	17.91	2.21	
Consumer Staples	1,024.0	1.49	-0.46	4.21	24.22	55.49	2.19	20.81	2.04	0.31
Insurance	1,995.2	0.59	-6.57	-15.95	-20.81	-12.98	1.08	10.82	4.00	0.80
Consumer Discretionary	1,805.0	1.06	3.41	6.58	17.21	12.54				
Energy	1,099.0	2.52	4.46	2.42	6.68	15.81	0.92	9.21	5.91	0.22
Technology	1,535.0	-8.26	-8.26	-5.80	-3.21	165.41	1.94	696.97		0.02
Utilities	407.9	1.31	1.97	-3.73	-3.13	-10.41				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil rebounded on Wednesday after a sharp drop in the previous session ended a three-day streak of gains as investors have whipsawed between concerns about potential supply losses from Libya and the Middle East and worries about global fuel demand. Brent crude futures were up 25 cents, or 0.31%, at \$79.80 a barrel.

Kuwait Market

The market closed up by +0.37% at 7,188.2 value traded 56.5 million KD, Premier market value reached 37.1 million KD up by +0.53% at 7,839.4.

KSA Market

The market closed down by -0.64% at 12,182.2.

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	0.00	0.11	-2.43	3.15	3.71	1.69	13.23	3.83	7.39
KFH	0.726	0.83	0.97	-1.49	2.98	9.00	2.10	20.26	2.64	12.48
ZAIN	0.469	2.18	2.40	3.08	5.16	-7.50	1.77	10.96	7.46	2.04
BOUBYAN BANK	0.590	-0.34	0.00	-0.34	4.61	4.23	2.43	29.98	1.28	2.49
AGILITY	0.258	0.78	-1.15	-5.84	-7.53	-8.90	0.75	8.35	7.75	0.69
Saudi Arabia										
ARAMCO	27.85	-0.36	0.72	0.91	-0.18	-15.61	4.47	15.46	6.82	6,736.83
SABIC	75.50	-1.31	1.21	-4.19	2.30	-9.58	1.38	117.80	4.37	226.40
STC	43.60	0.00	9.69	13.25	14.44	10.81	2.85	15.83	3.67	217.91
AL-RAJHI BANK	88.00	-0.68	-1.01	2.80	10.00	1.73	3.02	21.22	2.73	351.85
NCB	36.05	-1.50	-2.30	-5.13	-0.55	-6.73	1.20	11.02	4.99	216.21
Abu Dhabi										
ETISALAT.AD	17.66	0.00	0.11	7.81	9.69	-10.08	3.50	13.85	4.61	153.58
FAB.AD	13.36	0.91	0.30	2.45	7.22	-4.30	1.20	9.26	5.31	147.59
EMIRATES NBD	19.75	0.00	0.00	3.40	19.70	14.16	1.07	5.54	6.08	124.75
DB ISLAMIC DB	6.20	0.65	1.47	5.98	8.01	8.39	1.01	6.80	7.26	44.89
EMAR.DU	8.56	1.06	2.64	-0.81	4.39	8.08	0.98	6.29	5.84	75.66
Qatar										
QNB	15.790	-0.44	1.87	3.27	7.78	-4.48	1.34	9.78	4.15	145.82
INDUSTREIS QAT	12.860	-1.08	-0.31	-1.76	-0.16	-1.68	2.07	14.93	5.44	77.79
QA ISLAMIC BK	19.340	-0.72	-0.46	-1.83	3.98	-10.05	1.54	10.89	3.17	45.69
MASRAF AL RAYA	2.295	0.35	2.73	-1.50	-1.46	-13.56	0.87	14.92	4.36	21.34
MESAIEED PETRO	1.644	0.55	1.11	-1.73	-0.06	-8.05	1.26	23.05	4.26	20.65
Oman										
BANK MUSCAT	0.259	-0.38	0.39	2.78	3.19	-1.89	0.83	9.86	5.98	1.95
OMANTEL	1.000	0.00	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	0.330	-1.49	-1.20	-2.94	-7.04	-16.52	0.73	7.96	6.06	0.22

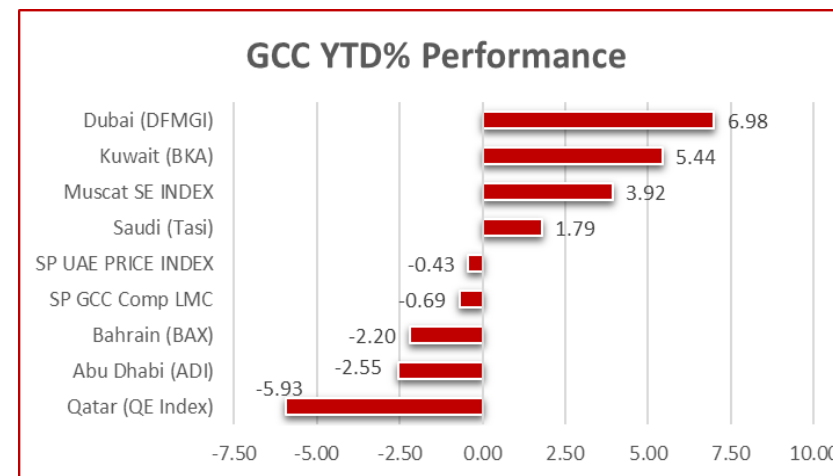
* GCC Markets performance at the latest close.

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, Bursa 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 2.52 % Telecom 1.77 % Consumer services 1.49 % respectively.

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have negative performance today by -1.3%, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.68 %.



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