

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 27th June 2024



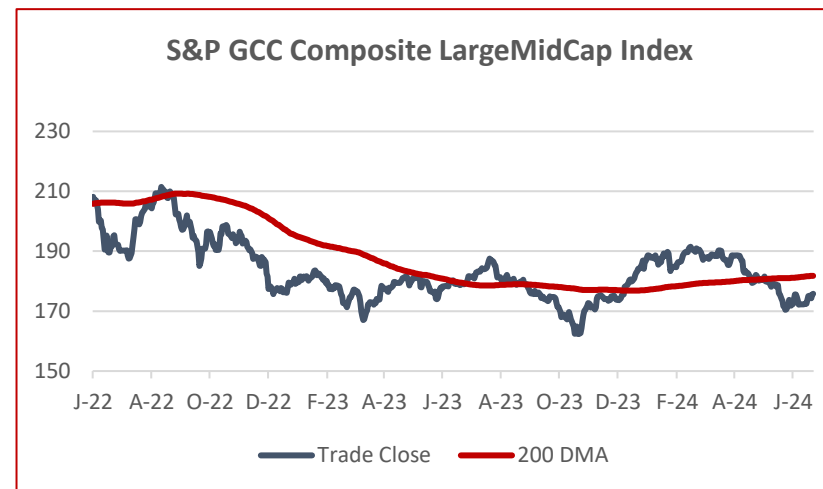


Thursday, June 27, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,729.6	0.63	2.01	1.97	-5.42	-1.99	2.86	22.57	3.27	10,020.90
Qatar (QE Index)	9,961.6	0.92	2.67	6.89	1.16	-8.02	1.15	11.37	4.75	501.19
Dubai (DFMGI)	4,030.0	0.52	0.44	1.31	-5.09	-0.73	1.40	8.23	5.99	596.26
Abu Dhabi (ADI)	9,060.7	0.63	0.53	2.24	-1.81	-5.40	2.61	16.28	2.12	2,549.81
Bahrain (BAX)	2,030.7	-0.16	-0.54	-0.41	-0.59	3.00	0.87	11.02	4.28	8.01
Muscat SE INDEX	4,687.9	0.31	0.18	-3.26	1.13	3.85	0.80	10.00	5.86	6.45
SP GCC Comp LMC	175.8	0.16	1.94	3.04	-5.19	-4.96	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	127.7	0.77	1.62	2.94	-5.18	-7.37				
Developed Markets										
MSCI World Index	3,511.8	-0.29	0.11	1.93	2.15	10.81				
U.S. (S&P 500)	5,460.5	-0.41	-0.08	3.47	3.92	14.48	4.54	26.77	1.61	48,454.96
U.K. (FTSE 100)	8,164.1	-0.19	-0.89	-1.34	2.66	5.57	1.72	14.69	3.73	2,134.48
Japan (topix)	2,809.6	0.57	3.12	1.34	1.48	18.73	1.47	15.56	2.06	988,048.11
Emerging Markets										
MSCI EM Index	1,086.2	0.41	-0.06	3.55	4.13	6.11				
China (SSE Composite)	2,967.4	0.73	-1.03	-3.87	-2.43	-0.25	1.36	12.00		44,025.04
India (Sensex)	79,032.7	-0.27	2.36	6.86	7.31	9.40	4.99	23.48	1.12	155,951.84

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,967.1	0.58	-1.01	-1.20	-4.91	2.20	1.43	14.93	3.68	41.93
Kuwait Premier Index	7,576.3	0.57	-1.01	-1.38	-5.73	1.33	1.55	16.28	3.50	34.64
Kuwait Main Index	5,938.6	0.60	-1.04	-0.32	-0.79	6.62	1.04	10.34	4.57	7.29
Kuwait Sector										
Banking	1,724.1	0.84	-0.50	-1.00	-2.68	4.65	1.71	17.12	3.08	25.82
Telecom	981.8	-0.45	-1.53	-1.52	-7.82	-11.16	1.44	11.71	8.56	3.00
Industrials	763.0	0.90	-2.57	2.89	-27.01	-15.96	0.80	11.35	5.66	2.58
Financial Services	1,309.6	1.12	-1.62	-3.73	-3.25	8.03	1.07	11.77	3.04	4.36
Real Estate	1,295.6	-0.30	-2.43	-2.32	0.00	6.82	0.99	13.91	2.11	2.75
Basic Materials	760.4	-7.69	-7.30	-9.50	-3.74	1.94	1.37	13.33	11.52	0.43
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	820.0	-0.83	-6.45	-6.48	6.12	24.50	1.78	18.20	2.51	0.25
Insurance	2,574.5	0.98	0.46	2.55	0.28	12.29	1.40	12.69	3.08	1.04
Consumer Discretionary	1,566.7	0.34	0.68	-0.10	-10.56	-2.32				
Energy	1,042.7	-0.61	-1.06	-2.45	-0.03	9.87	0.90	9.65	6.43	0.21
Technology	1,622.3	3.24	-4.70	-4.70	-14.89	180.50	1.88	268.67		0.02
Utilities	418.4	0.63	-1.24	0.00	-5.92	-8.09				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

West Texas Intermediate briefly hit an intraday high of \$82.72 per barrel, the highest level for the U.S. benchmark since April 30. Brent rose to \$87.22 per barrel earlier in the session, the global benchmark's highest level in two months. U.S. oil gained 1% for the week and 5.9% for June.

Kuwait Market

The market closed up by 0.58% at 6,967.1 value traded 39.8 million KD, Premier market value reached 34.9 million KD up by 0.57% at 7,576.3.

KSA Market

The market closed up by 0.63% at 11,729.6



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.862	1.41	0.23	0.58	-4.73	1.24	1.70	13.03	3.87	7.18
KFH	0.710	0.57	-0.56	-2.74	-2.78	6.60	2.08	20.89	2.58	12.16
ZAIN	0.445	-0.67	-1.98	-0.67	-9.74	-12.23	1.55	10.11	7.87	1.93
BOUBYAN BANK	0.566	0.89	-0.35	-2.25	-2.92	-0.01	2.38	30.20	1.33	2.38
AGILITY	0.275	2.23	-3.85	-6.14	-24.43	-2.90	0.74	8.07	7.27	0.74
Saudi Arabia										
ARAMCO	27.70	0.00	0.00	-4.48	-10.21	-16.06	4.40	15.28	6.76	6,701.79
SABIC	73.50	-0.14	0.00	-3.29	-6.13	-11.98	1.32	192.80	4.49	220.45
STC	37.50	1.08	2.46	4.17	-2.77	-4.69	2.32	13.92	4.27	187.46
AL-RAJHI BANK	81.50	0.49	3.16	7.10	-0.97	-5.78	3.01	20.32	2.82	325.92
NCB	36.70	2.23	4.41	8.42	-8.71	-5.05	1.21	11.33	4.77	220.15
Abu Dhabi										
ETISALAT.AD	15.94	1.00	1.51	0.00	-12.31	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.30	1.30	5.59	7.41	-5.75	-10.74	1.15	8.66	5.70	137.63
EMIRATES NBD	16.50	0.30	0.61	6.11	-5.71	-4.62	0.96	4.81	7.27	104.21
DB ISLAMIC DB	5.74	1.41	-0.35	3.99	-1.54	0.35	0.97	6.39	7.84	41.56
EMAR.DU	8.20	1.23	3.80	7.05	0.37	3.54	0.91	6.39	6.10	72.47
Qatar										
QNB	14.610	0.41	2.89	8.22	2.67	-11.62	1.29	9.23	4.45	134.94
INDUSTREIS QAT	12.800	0.00	3.23	10.82	7.11	-2.14	2.12	16.02	6.09	77.44
QA ISLAMIC BK	18.600	0.65	4.20	8.14	1.36	-13.49	1.54	10.63	3.90	43.95
MASRAF AL RAYA	2.333	1.88	0.52	1.30	0.56	-12.13	0.90	15.21	4.29	21.70
MESAIEED PETRO	1.646	0.18	-2.02	-4.30	-17.04	-7.94	1.28	20.52	5.22	20.68
Oman										
BANK MUSCAT	0.25	0.00	-0.40	-3.47	-4.58	-5.30	0.82	9.75	6.20	1.88
OMANTEL	1.000	0.20	-1.57	-5.39	-2.91	-5.66	1.22	11.29	6.00	0.75
BANK DHOFAR	0.165	0.00	7.84	5.10	3.13	3.13	0.69	16.37	4.70	0.49
NAT BANK OF OMAN	0.255	0.79	-0.78	-8.93	-1.92	-8.93	0.61	8.93	3.33	0.41
OMINVEST	0.360	1.41	-1.37	-6.49	-1.92	-8.93	0.76	7.82	5.56	0.24

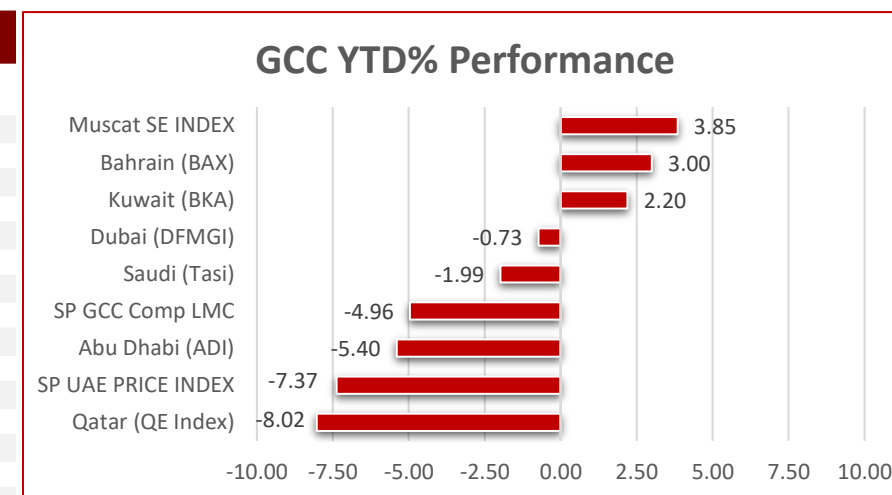
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
19-June-24	24.49%	13.73%	0.06%	2.35%	6.24%	17.72%	13.06%	6.05%	5.59%
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%

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 + 0.58 %The leading sector best performance indices today are Technology 3.24 % Financial services 1.12 % Insurance 0.98 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 0.13%. STC has a positive performance today by + 1.08 %, Al Rajhi Bank has a positive performance today by + 0.49 %



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