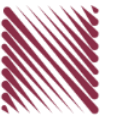


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 28th August 2024





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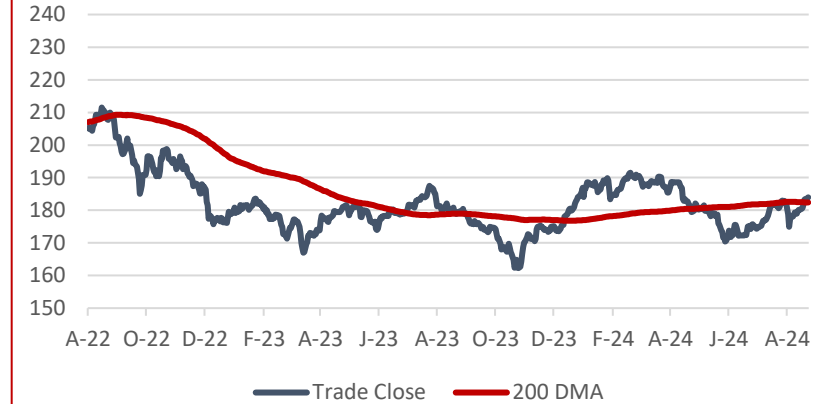
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,117.2	-0.53	-0.63	0.06	3.75	1.25	3.04	23.13	3.26	10,177.81
Qatar (QE Index)	10,137.0	-0.51	0.14	-0.17	1.70	-6.40	1.18	11.45	4.42	513.66
Dubai (DFMGI)	4,324.2	-0.44	0.73	1.32	7.30	6.51	1.52	8.43	5.57	651.20
Abu Dhabi (ADI)	9,288.9	-0.48	-0.91	-0.54	2.52	-3.02	2.68	13.27	2.08	2,567.54
Bahrain (BAX)	1,958.1	1.55	1.01	-0.60	-3.33	-0.68	0.88	10.04	4.72	7.57
Muscat SE INDEX	4,720.2	0.62	0.98	1.26	0.70	4.57	0.84	10.04	5.77	7.35
SP GCC Comp LMC	182.3	-0.75	-0.63	-0.35	4.16	-1.44	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.2	-0.78	-0.18	0.50	6.65	-1.21				

Developed Markets										
MSCI World Index	3,631.2	-0.44	-0.50	1.67	3.40	14.58				
U.S. (S&P 500)	5,592.2	-0.60	-0.75	1.27	2.41	17.24	4.65	26.88	1.56	49,776.60
U.K. (FTSE 100)	8,343.9	-0.02	0.19	-0.29	2.20	7.90	1.78	15.18	3.66	2,171.59
Japan (topix)	2,692.1	0.42	0.28	-3.66	-4.18	13.76	1.41	14.66	2.15	949,531.47
Emerging Markets										
MSCI EM Index	1,097.2	-0.23	-0.31	1.15	1.01	7.18				
China (SSE Composite)	2,837.4	-0.40	-0.59	-3.45	-4.38	-4.62	1.36	12.00		44,025.04
India (Sensex)	81,785.6	0.09	0.86	0.05	3.48	13.21	4.36	23.87	1.12	162,492.28

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,180.4	-0.11	0.23	-0.82	3.51	5.33	1.47	15.47	3.61	43.27
Kuwait Premier Index	7,819.6	-0.25	0.23	-1.01	3.66	4.58	1.60	16.78	3.43	35.84
Kuwait Main Index	6,077.2	0.60	0.19	0.14	2.79	9.11	1.06	10.86	4.49	7.43
Kuwait Sector										
Banking	1,776.0	-0.10	0.27	-1.57	3.73	7.80	1.76	17.59	3.05	26.61
Telecom	1,015.6	0.44	2.15	2.35	3.25	-8.10	1.48	12.20	8.31	3.09
Industrials	759.9	-0.60	-2.21	-3.20	-1.65	-16.30	0.82	11.90	5.65	2.59
Financial Services	1,399.2	-0.19	0.94	2.54	6.71	15.43	1.15	12.55	2.81	4.69
Real Estate	1,342.1	-0.23	-0.25	0.66	3.59	10.65	1.03	14.62	2.03	2.85
Basic Materials	821.7	2.13	3.79	9.55	8.76	10.15	1.45	13.90	10.89	0.45
Health Care	441.4	0.00	-6.78	-5.68	-0.05	-8.45	1.48	16.70	2.37	
Consumer Staples	1,011.0	-1.27	-1.73	2.89	22.64	53.52	2.22	21.12	2.01	0.31
Insurance	1,995.5	0.01	-6.56	-15.94	-20.80	-12.97	1.09	10.89	3.98	0.81
Consumer Discretionary	1,797.7	-0.41	2.99	6.15	16.74	12.08				
Energy	1,079.3	-1.80	2.59	0.58	4.76	13.73	0.94	9.44	5.76	0.22
Technology	1,622.3	5.69	-3.04	-0.45	2.29	180.50	1.78	639.39		0.02
Utilities	405.3	-0.64	1.32	-4.35	-3.75	-10.98				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices held mostly steady on Thursday as a smaller-than-expected draw in U.S. crude inventories and continued worries over China demand countered supply disruptions out of Libya. Brent crude futures were down 1 cent, or 0.01%, at \$78.64 a barrel.

Kuwait Market

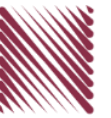
The market closed down by -0.11% at 7,180.4 value traded 72.0 million KD, Premier market value reached 53.5 million KD down by -0.25% at 7,819.6.

KSA Market

The market closed down by -0.53% at 12,117.2.

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	0.875	-0.91	-0.79	-3.31	2.22	2.77	1.67	13.11	3.86	7.33
KFH	0.725	-0.14	0.83	-1.63	2.84	8.85	2.09	20.23	2.64	12.48
ZAIN	0.469	0.00	2.40	3.08	5.16	-7.50	1.77	10.96	7.46	2.04
BOUBYAN BANK	0.590	0.00	0.00	-0.34	4.61	4.23	2.43	29.98	1.28	2.49
AGILITY	0.255	-1.16	-2.30	-6.93	-8.60	-9.96	0.74	8.25	7.84	0.69
Saudi Arabia										
ARAMCO	27.75	-0.36	0.36	0.54	-0.54	-15.91	4.45	15.40	6.85	6,712.46
SABIC	75.80	0.40	1.61	-3.81	2.71	-9.22	1.39	118.27	4.35	227.30
STC	42.70	-2.06	7.42	10.91	12.07	8.52	2.79	15.51	3.75	213.40
AL-RAJHI BANK	86.70	-1.48	-2.47	1.29	8.38	0.23	2.98	20.90	2.77	346.64
NCB	35.20	-2.36	-4.61	-7.37	-2.90	-8.93	1.17	10.76	5.11	211.10
Abu Dhabi										
ETISALAT.AD	17.26	-2.27	-2.15	5.37	7.20	-12.12	3.42	13.54	4.72	150.09
FAB.AD	13.20	-1.20	-0.90	1.23	5.94	-5.44	1.18	9.15	5.38	145.81
EMIRATES NBD	19.60	-0.76	-0.76	2.62	18.79	13.29	1.06	5.50	6.12	123.79
DB ISLAMIC DB	6.13	-1.13	0.33	4.79	6.79	7.17	1.00	6.72	7.34	44.38
EMAR.DU	8.43	-1.52	1.08	-2.32	2.80	6.44	0.96	6.20	5.93	74.50
Qatar										
QNB	15.650	-0.89	0.97	2.35	6.83	-5.32	1.33	9.69	4.19	144.57
INDUSTREIS QAT	12.800	-0.47	-0.78	-2.22	-0.62	-2.14	2.06	14.86	5.47	77.45
QA ISLAMIC BK	19.360	0.10	-0.36	-1.73	4.09	-9.95	1.54	10.90	3.16	45.75
MASRAF AL RAYA	2.251	-1.92	0.76	-3.39	-3.35	-15.22	0.86	14.64	4.44	20.94
MESAEED PETRO	1.625	-1.16	-0.06	-2.87	-1.22	-9.12	1.24	22.78	4.31	20.42
Oman										
BANK MUSCAT	0.259	0.00	0.39	2.78	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	1.010	1.00	1.00	1.00	-0.49	-4.72	1.22	11.81	5.94	0.76
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	0.00	-1.20	-2.94	-7.04	-16.52	0.73	7.96	6.06	0.22

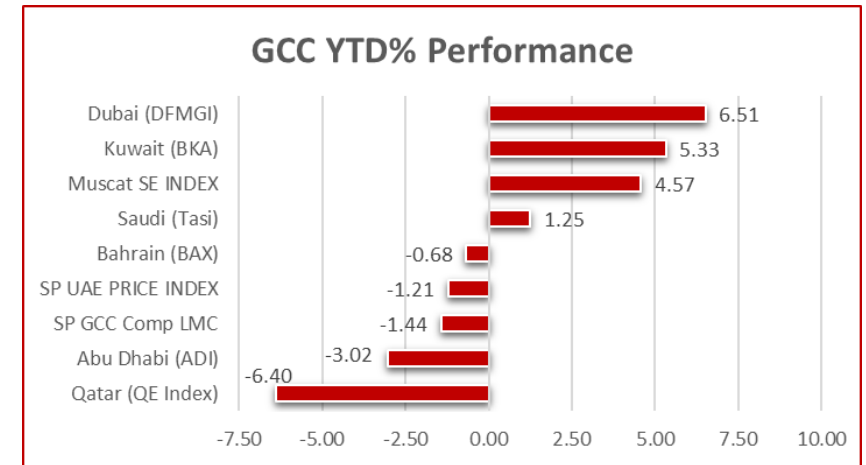
* GCC Markets performance at the latest close.

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 down today by -0.11 % The leading sector bottom performance indices today are Energy -1.8 % Consumer services -1.27 % Utilities -0.64 % respectively

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have positive performance today by + 0.39%, STC have negative performance today by -2.06 %, Al Rajhi Bank have negative performance today by -1.48 %.



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