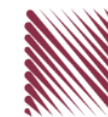


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday ,28th July 2024





Sunday, July 28, 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)	12,175.4	1.24	1.24	4.25	4.25	1.74	3.26	25.77	3.16	10,284.49
Qatar (QE Index)	10,135.8	0.37	0.37	1.69	1.69	-6.42	1.17	11.69	4.63	511.94
Dubai (DFMGI)	4,280.3	1.01	2.38	6.21	6.21	5.43	1.49	8.65	5.66	640.61
Abu Dhabi (ADI)	9,317.8	0.15	0.91	2.84	2.84	-2.72	2.69	16.59	2.06	2,587.40
Bahrain (BAX)	1,970.1	-0.25	-0.25	-2.73	-2.73	-0.07	0.87	11.12	4.55	7.61
Muscat SE INDEX	4,627.1	-0.63	-0.63	-1.28	-1.28	2.50	0.82	9.88	5.91	7.20
SP GCC Comp LMC	182.8	1.01	1.01	4.43	4.43	-1.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	135.0	0.00	0.00	5.76	5.76	-2.04				

Developed Markets										
MSCI World Index	3,524.1	0.95	-0.84	0.35	0.35	11.20				
U.S. (S&P 500)	5,459.1	1.11	-0.83	-0.03	-0.03	14.45	4.56	26.50	1.62	48,374.18
U.K. (FTSE 100)	8,285.7	1.21	1.59	1.49	1.49	7.14	1.76	14.96	3.69	2,158.10
Japan (topix)	2,699.5	-0.38	-5.64	-3.92	-3.92	14.08	1.41	14.94	2.14	950,238.96
Emerging Markets										
MSCI EM Index	1,072.3	-0.16	-1.59	-1.29	-1.29	4.74				
China (SSE Composite)	2,890.9	0.14	-3.07	-2.58	-2.58	-2.82	1.36	12.00		44,025.04
India (Sensex)	81,332.7	1.62	0.90	2.91	2.91	12.59	4.60	24.03	1.12	161,475.82

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,177.7	0.32	0.32	3.47	3.47	5.29	1.47	15.26	3.63	43.09
Kuwait Premier Index	7,830.2	0.38	0.38	3.80	3.80	4.72	1.59	16.65	3.45	35.67
Kuwait Main Index	6,024.0	0.04	0.04	1.89	1.89	8.16	1.06	10.46	4.51	7.42
Kuwait Sector										
Banking	1,773.9	0.46	0.46	3.61	3.61	7.67	1.75	17.37	3.07	26.44
Telecom	996.6	-0.06	-0.06	1.31	1.31	-9.82	1.46	11.79	8.43	3.05
Industrials	793.0	0.06	0.06	2.64	2.64	-12.65	0.85	11.78	5.45	2.68
Financial Services	1,367.4	0.44	0.44	4.28	4.28	12.80	1.11	12.22	2.93	4.56
Real Estate	1,348.0	0.37	0.37	4.05	4.05	11.14	1.03	14.46	2.03	2.85
Basic Materials	748.1	0.11	0.11	-0.98	-0.98	0.29	1.34	13.11	11.72	0.42
Health Care	468.0	0.00	0.00	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	1,114.5	-2.75	-2.75	35.19	35.19	69.22	2.49	25.43	1.79	0.35
Insurance	2,230.2	-3.18	-3.18	-11.49	-11.49	-2.73	1.26	11.31	3.44	0.93
Consumer Discretionary	1,719.0	1.63	1.63	11.62	11.62	7.17				
Energy	1,081.3	2.88	2.88	4.95	4.95	13.94	0.90	9.78	6.43	0.21
Technology	1,564.1	-3.15	-3.15	-1.38	-1.38	170.44	1.87	267.47		0.02
Utilities	431.6	0.00	0.00	2.50	2.50	-5.20				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Monday, paring last week's loss, on fears of a widening conflict in the Middle East following a rocket strike in the Israeli-occupied Golan Heights, which Israel and the United States blamed on Lebanese armed group Hezbollah. Brent crude futures gained 20 cents, or 0.3%, to \$81.33 a barrel.

Kuwait Market

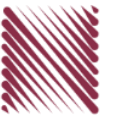
The market closed up by +0.32% at 7,177.7 value traded 45.0 million KD, Premier market value reached 32.1 million KD up by +0.38% at 7,830.2.

KSA Market

The market closed up by +1.24% at 12,175.4.

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	0.23	0.23	2.22	2.22	2.77	1.67	13.11	3.86	7.32
KFH	0.737	0.55	0.55	4.54	4.54	10.65	2.13	20.57	2.60	12.67
ZAIN	0.455	0.00	0.00	2.02	2.02	-10.26	1.58	10.33	7.69	1.98
BOUBYAN BANK	0.571	-0.17	-0.17	1.24	1.24	0.88	2.35	29.01	1.32	2.41
AGILITY	0.284	0.35	0.35	1.79	1.79	0.28	0.76	8.34	7.04	0.76
Saudi Arabia										
ARAMCO	28.20	0.71	0.71	1.08	1.08	-14.55	4.48	15.55	6.64	6,822.58
SABIC	78.70	1.16	1.16	6.64	6.64	-5.75	1.41	206.44	4.19	236.04
STC	39.05	-0.26	-0.26	2.49	2.49	-0.75	2.42	14.49	4.10	195.20
AL-RAJHI BANK	85.80	2.75	2.75	7.25	7.25	-0.81	3.17	21.39	2.68	343.11
NCB	37.70	1.62	1.62	4.00	4.00	-2.46	1.25	11.64	4.64	226.14
Abu Dhabi										
ETISALAT.AD	17.26	1.05	6.02	7.20	7.20	-12.12	3.44	14.37	4.63	150.08
FAB.AD	12.60	-0.16	0.00	1.12	1.12	-9.74	1.13	8.73	5.63	139.18
EMIRATES NBD	18.45	3.07	5.13	11.82	11.82	6.65	1.00	5.18	6.50	116.52
DB ISLAMIC DB	5.92	1.02	-0.67	3.14	3.14	3.50	0.97	6.49	7.60	42.86
EMAR.DU	8.73	2.46	4.55	6.46	6.46	10.23	0.97	6.80	5.73	77.15
Qatar										
QNB	15.270	0.00	0.00	4.23	4.23	-7.62	1.30	9.45	4.29	141.01
INDUSTREIS QAT	13.200	0.76	0.76	2.48	2.48	0.92	2.19	16.52	5.91	79.84
QA ISLAMIC BK	19.200	0.16	0.16	3.23	3.23	-10.70	1.53	10.81	3.19	45.36
MASRAF AL RAYA	2.329	-0.04	-0.04	0.00	0.00	-12.28	0.89	15.15	4.29	21.66
MESAIEED PETRO	1.670	0.30	0.30	1.52	1.52	-6.60	1.30	20.82	5.15	20.98
Oman										
BANK MUSCAT	0.251	-0.40	-0.40	0.00	0.00	-4.92	0.82	9.79	6.18	1.88
OMANTEL	0.970	-3.00	-3.00	-4.43	-4.43	-8.49	1.18	10.95	6.19	0.73
BANK DHOFAR	0.154	0.00	0.00	-6.67	-6.67	-3.75	0.64	14.54	5.03	0.46
NAT BANK OF OMAN	0.260	0.00	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.334	-1.76	-1.76	-5.92	-5.92	-15.51	0.71	7.26	5.99	0.22

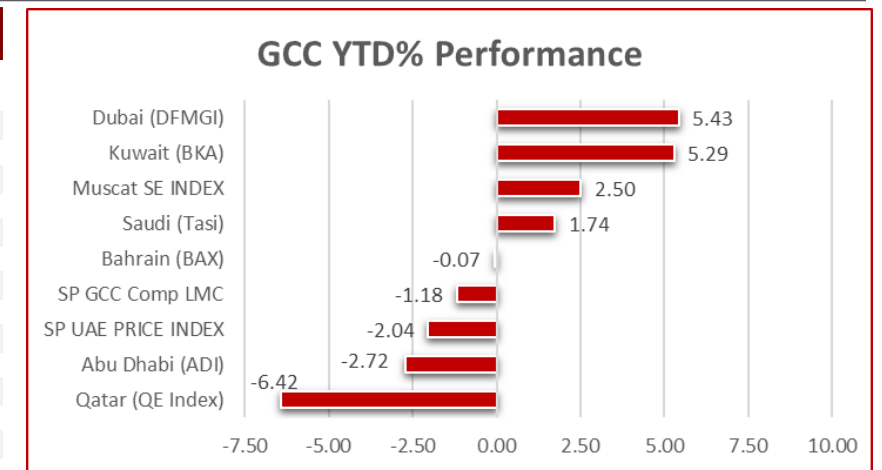
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
17-July-24	24.41%	13.88%	0.06%	2.77%	6.80%	17.61%	12.93%	6.01%	5.66%
24-July-24	24.42%	14.01%	0.06%	2.75%	6.84%	17.61%	12.93%	6.02%	5.67%

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 + 0.32 %The leading sector best performance indices today are Energy 2.88 % Consumer Disc 1.63 % Banking 0.46 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.71 %, SABIC have positive performance today by + 1.15%, STC have negative performance today by -0.26 %, Al Rajhi Bank has a positive performance today by + 2.75 %.



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