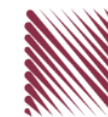


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 29th August 2024





Thursday, August 29, 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)	12,145.2	0.23	-0.40	0.29	3.99	1.49	3.06	23.27	3.36	10,231.97
Qatar (QE Index)	10,203.0	0.65	0.79	0.48	2.36	-5.79	1.19	11.53	4.39	517.50
Dubai (DFMGI)	4,325.5	-0.20	0.76	1.34	7.33	6.54	1.52	8.47	5.56	651.48
Abu Dhabi (ADI)	9,284.9	0.57	-0.95	-0.58	2.47	-3.06	2.68	13.27	2.08	2,556.09
Bahrain (BAX)	1,957.5	-0.03	0.98	-0.63	-3.36	-0.71	0.88	10.04	4.72	7.55
Muscat SE INDEX	4,746.4	0.55	1.54	1.82	1.26	5.15	0.84	10.09	5.74	7.39
SP GCC Comp LMC	183.3	0.21	-0.09	0.19	4.73	-0.90	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.8	1.04	0.99	1.68	7.91	-0.05				
Developed Markets										
MSCI World Index	3,661.2	0.80	0.32	2.51	4.26	15.53				
U.S. (S&P 500)	5,648.4	1.01	0.24	2.28	3.44	18.42	4.68	26.82	1.56	49,974.72
U.K. (FTSE 100)	8,376.6	-0.04	0.59	0.10	2.60	8.32	1.79	15.25	3.64	2,180.33
Japan (topix)	2,712.6	0.73	1.04	-2.92	-3.45	14.63	1.42	14.77	2.14	956,084.39
Emerging Markets										
MSCI EM Index	1,099.9	0.45	-0.07	1.40	1.26	7.44				
China (SSE Composite)	2,842.2	0.68	-0.43	-3.28	-4.22	-4.46	1.36	12.00		44,025.04
India (Sensex)	82,365.8	0.28	1.58	0.76	4.22	14.02	4.39	23.89	1.11	163,933.82
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,180.9	0.01	0.23	-0.81	3.52	5.33	1.47	15.45	3.61	43.23
Kuwait Premier Index	7,822.0	0.03	0.27	-0.98	3.69	4.61	1.60	16.74	3.44	35.76
Kuwait Main Index	6,070.7	-0.11	0.08	0.03	2.68	8.99	1.07	10.89	4.47	7.47
Kuwait Sector										
Banking	1,778.8	0.16	0.43	-1.42	3.90	7.97	1.77	17.60	3.05	26.63
Telecom	1,013.6	-0.20	1.94	2.14	3.05	-8.28	1.48	12.23	8.29	3.10
Industrials	760.8	0.12	-2.09	-3.08	-1.53	-16.20	0.81	11.84	5.68	2.57
Financial Services	1,398.5	-0.05	0.88	2.49	6.65	15.36	1.15	12.47	2.82	4.68
Real Estate	1,343.7	0.12	-0.14	0.77	3.71	10.78	1.03	14.61	2.04	2.84
Basic Materials	816.8	-0.59	3.17	8.91	8.11	9.50	1.47	14.11	10.72	0.46
Health Care	441.4	0.00	-6.78	-5.68	-0.05	-8.45	1.48	16.70	2.37	
Consumer Staples	991.9	-1.90	-3.59	0.94	20.31	50.60	2.15	20.45	2.07	0.30
Insurance	1,961.7	-1.69	-8.14	-17.36	-22.15	-14.44	1.07	10.70	4.04	0.79
Consumer Discretionary	1,773.4	-1.35	1.60	4.71	15.16	10.57				
Energy	1,099.1	1.83	4.46	2.42	6.68	15.81	0.94	9.46	5.76	0.22
Technology	1,600.5	-1.34	-4.35	-1.79	0.92	176.73	1.86	666.67		0.02
Utilities	402.6	-0.65	0.66	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices retreated on Friday as investors weighed expectations of a rise in OPEC+ supply starting in October, alongside dwindling hopes of a hefty U.S. interest rate cut next month, following data showing strong consumer spending. Brent crude futures for October delivery, which expire on Friday, settled \$1.14 lower, or 1.43%, at \$78.80 a barrel, marking a decline of 0.3% for the week and 2.4% for the month.

Kuwait Market

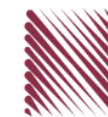
The market closed up by +0.01% at 7,180.9 value traded 85.5 million KD, Premier market value reached 68.6 million KD up by +0.03% at 7,822.0.

KSA Market

The market closed up by +0.23% at 12,145.2.

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	0.878	0.34	-0.45	-2.98	2.57	3.12	1.68	13.16	3.85	7.36
KFH	0.727	0.28	1.11	-1.36	3.12	9.15	2.10	20.29	2.64	12.53
ZAIN	0.467	-0.43	1.97	2.64	4.71	-7.89	1.76	10.91	7.49	2.04
BOUBYAN BANK	0.588	-0.34	-0.34	-0.68	4.26	3.88	2.43	29.88	1.28	2.49
AGILITY	0.256	0.39	-1.92	-6.57	-8.24	-9.61	0.75	8.28	7.81	0.69
Saudi Arabia										
ARAMCO	27.95	0.72	1.08	1.27	0.18	-15.30	4.48	15.51	6.80	6,759.39
SABIC	74.80	-1.32	0.27	-5.08	1.36	-10.42	1.37	116.71	4.41	224.25
STC	43.00	0.70	8.18	11.69	12.86	9.29	2.81	15.62	3.72	214.86
AL-RAJHI BANK	88.10	1.61	-0.90	2.92	10.13	1.85	3.03	21.24	2.72	352.17
NCB	35.00	-0.57	-5.15	-7.89	-3.45	-9.44	1.16	10.70	5.14	209.86
Abu Dhabi										
ETISALAT.AD	17.50	3.66	2.83	10.74	12.67	-7.64	3.60	14.23	4.49	157.75
FAB.AD	13.16	1.82	0.60	2.76	7.54	-4.01	1.20	9.29	5.30	148.03
EMIRATES NBD	19.70	-1.01	-0.25	3.14	19.39	13.87	1.07	5.53	6.09	124.43
DB ISLAMIC DB	6.17	0.49	0.98	5.47	7.49	7.87	1.01	6.76	7.29	44.67
EMAR.DU	8.44	-0.24	1.20	-2.20	2.93	6.57	0.97	6.20	5.92	74.59
Qatar										
QNB	15.840	1.21	2.19	3.60	8.12	-4.17	1.34	9.81	4.14	146.33
INDUSTREIS QAT	12.900	0.78	0.00	-1.45	0.16	-1.38	2.08	14.97	5.43	78.06
QA ISLAMIC BK	19.540	0.93	0.57	-0.81	5.05	-9.12	1.55	11.00	3.13	46.18
MASRAF AL RAYA	2.300	2.18	2.95	-1.29	-1.25	-13.37	0.88	14.96	4.35	21.39
MESAIEED PETRO	1.650	1.54	1.48	-1.37	0.30	-7.72	1.26	23.13	4.24	20.73
Oman										
BANK MUSCAT	0.258	-0.39	0.00	2.38	2.79	-2.27	0.82	9.82	6.01	1.93
OMANTEL	1.009	-0.10	0.90	0.90	-0.59	-4.81	1.22	11.80	5.95	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	0.00	-1.20	-2.94	-7.04	-16.52	0.73	7.96	6.06	0.22

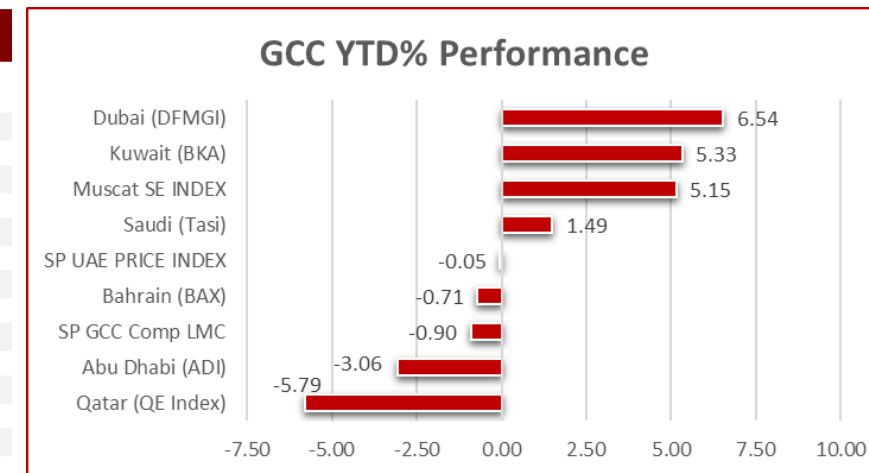
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
21-August 24	24.57%	14.80%	0.06%	3.30%	7.67%	17.58%	12.97%	5.97%	5.74%
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%

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 + 0.01 %The leading sector best performance indices today are Energy 1.83 % Banking 0.16 % Industrials 0.12 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.72 %, SABIC have negative performance today by -1.3%, STC has a positive performance today by + 0.7 %, Al Rajhi Bank has a positive performance today by + 1.61 %.



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