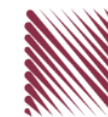


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 29th July 2024

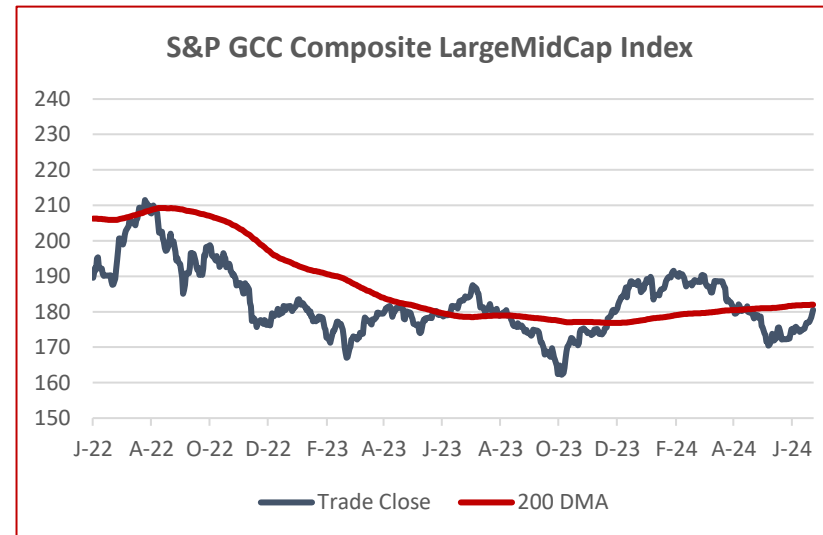




Monday, July 29, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,121.4	-0.44	0.79	3.78	3.78	1.29	3.24	25.64	3.17	10,207.23
Qatar (QE Index)	10,170.0	0.34	0.71	2.03	2.03	-6.10	1.17	11.73	4.61	513.29
Dubai (DFMGI)	4,308.5	0.66	0.66	6.91	6.91	6.13	1.50	8.70	5.62	646.39
Abu Dhabi (ADI)	9,395.4	0.83	0.83	3.69	3.69	-1.90	2.71	16.73	2.04	2,601.21
Bahrain (BAX)	1,972.0	0.09	-0.16	-2.64	-2.64	0.02	0.87	11.13	4.55	7.62
Muscat SE INDEX	4,652.1	0.54	-0.10	-0.75	-0.75	3.06	0.83	9.93	5.88	7.23
SP GCC Comp LMC	183.0	0.15	1.15	4.58	4.58	-1.04	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.1	1.51	1.51	7.36	7.36	-0.56				
Developed Markets										
MSCI World Index	3,526.5	0.07	0.07	0.42	0.42	11.28				
U.S. (S&P 500)	5,463.5	0.08	0.08	0.06	0.06	14.54	4.56	26.49	1.62	48,374.11
U.K. (FTSE 100)	8,292.4	0.08	0.08	1.57	1.57	7.23	1.76	14.95	3.68	2,159.81
Japan (topix)	2,759.7	2.23	2.23	-1.78	-1.78	16.62	1.44	15.29	2.10	970,630.55
Emerging Markets										
MSCI EM Index	1,077.3	0.47	0.47	-0.83	-0.83	5.23				
China (SSE Composite)	2,891.8	0.03	0.03	-2.55	-2.55	-2.79	1.36	12.00		44,025.04
India (Sensex)	81,355.8	0.03	0.03	2.94	2.94	12.62	4.60	23.94	1.12	161,557.80
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,190.7	0.18	0.50	3.66	3.66	5.48	1.47	15.27	3.61	43.23
Kuwait Premier Index	7,847.2	0.22	0.59	4.02	4.02	4.95	1.60	16.72	3.44	35.81
Kuwait Main Index	6,024.6	0.01	0.05	1.90	1.90	8.17	1.06	10.36	4.48	7.42
Kuwait Sector										
Banking	1,780.9	0.39	0.86	4.02	4.02	8.10	1.76	17.45	3.06	26.56
Telecom	997.0	0.04	-0.02	1.36	1.36	-9.78	1.46	11.78	8.43	3.05
Industrials	786.9	-0.77	-0.71	1.85	1.85	-13.33	0.85	11.80	5.44	2.68
Financial Services	1,372.8	0.39	0.83	4.69	4.69	13.24	1.12	12.25	2.92	4.58
Real Estate	1,347.2	-0.06	0.31	3.98	3.98	11.07	1.03	14.48	2.02	2.86
Basic Materials	748.1	0.00	0.11	-0.98	-0.98	0.29	1.35	13.13	11.71	0.42
Health Care	468.0	0.00	0.00	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	1,077.8	-3.29	-5.95	30.74	30.74	63.66	2.42	24.73	1.84	0.34
Insurance	2,231.1	0.04	-3.14	-11.46	-11.46	-2.69	1.22	10.94	3.56	0.90
Consumer Discretionary	1,702.5	-0.96	0.65	10.56	10.56	6.15				
Energy	1,082.8	0.14	3.03	5.10	5.10	14.10	0.92	10.07	6.20	0.22
Technology	1,498.7	-4.19	-7.21	-5.50	-5.50	159.12	1.81	259.04		0.02
Utilities	431.6	0.00	0.00	2.50	2.50	-5.20				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

U.S crude oil futures fell nearly 2% on Monday as traders appeared unfazed by the risk of a widening war between Israel and the Iran-backed militia Hezbollah.

Kuwait Market

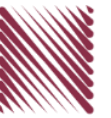
The market closed up by +0.18% at 7,190.7 value traded 43.8 million KD, Premier market value reached 33.5 million KD up by +0.22% at 7,847.2.

KSA Market

The market closed down by -0.44% at 12,121.4.

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	0.878	0.34	0.57	2.57	2.57	3.12	1.68	13.16	3.85	7.35
KFH	0.741	0.54	1.09	5.11	5.11	11.25	2.14	20.68	2.59	12.74
ZAIN	0.456	0.22	0.22	2.24	2.24	-10.06	1.59	10.36	7.68	1.98
BOUBYAN BANK	0.571	0.00	-0.17	1.24	1.24	0.88	2.35	29.01	1.32	2.41
AGILITY	0.279	-1.76	-1.41	0.00	0.00	-1.49	0.75	8.19	7.17	0.75
Saudi Arabia										
ARAMCO	27.90	-1.06	-0.36	0.00	0.00	-15.45	4.43	15.39	6.72	6,750.18
SABIC	79.00	0.38	1.54	7.05	7.05	-5.39	1.42	207.22	4.18	236.94
STC	38.90	-0.38	-0.64	2.10	2.10	-1.13	2.41	14.44	4.11	194.45
AL-RAJHI BANK	85.10	-0.82	1.92	6.38	6.38	-1.62	3.14	21.21	2.70	340.32
NCB	37.40	-0.80	0.81	3.17	3.17	-3.23	1.24	11.55	4.68	224.35
Abu Dhabi										
ETISALAT.AD	17.24	-0.12	-0.12	7.08	7.08	-12.22	3.44	14.35	4.64	149.91
FAB.AD	13.40	6.35	6.35	7.54	7.54	-4.01	1.20	9.29	5.30	148.02
EMIRATES NBD	18.75	1.63	1.63	13.64	13.64	8.38	1.02	5.26	6.40	118.42
DB ISLAMIC DB	5.97	0.84	0.84	4.01	4.01	4.37	0.97	6.54	7.54	43.22
EMAR.DU	8.96	2.63	2.63	9.27	9.27	13.13	1.00	6.98	5.58	79.18
Qatar										
QNB	15.350	0.52	0.52	4.78	4.78	-7.14	1.30	9.50	4.27	141.75
INDUSTREIS QAT	13.100	-0.76	0.00	1.71	1.71	0.15	2.17	16.39	5.95	79.24
QA ISLAMIC BK	19.380	0.94	1.10	4.19	4.19	-9.86	1.54	10.91	3.16	45.78
MASRAF AL RAYA	2.330	0.04	0.00	0.04	0.04	-12.24	0.89	15.15	4.29	21.66
MESAIEED PETRO	1.688	1.08	1.38	2.61	2.61	-5.59	1.31	21.04	5.09	21.20
Oman										
BANK MUSCAT	0.252	0.40	0.00	0.40	0.40	-4.55	0.82	9.83	6.15	1.90
OMANTEL	0.986	1.65	-1.40	-2.86	-2.86	-6.98	1.20	11.13	6.09	0.74
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	0.340	1.80	0.00	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

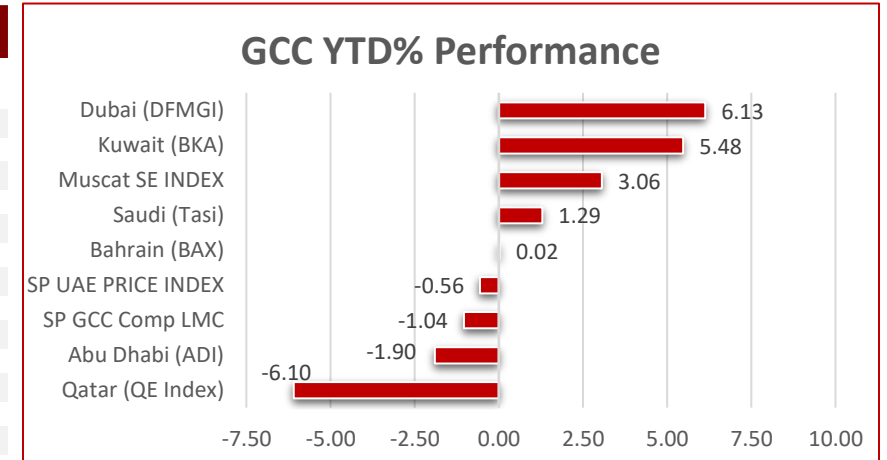
* GCC Markets performance at the latest close.

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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.18 %The leading sector best performance indices today are Banking 0.39 % Financial services 0.39 % Energy 0.14 % respectively

KSA

Saudi Armco have negative performance today by -1.06 %, SABIC have positive performance today by + 0.38%. STC have negative performance today by -0.38 %, Al Rajhi Bank have negative performance today by -0.82 %



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