

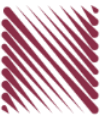


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 30th September 2024



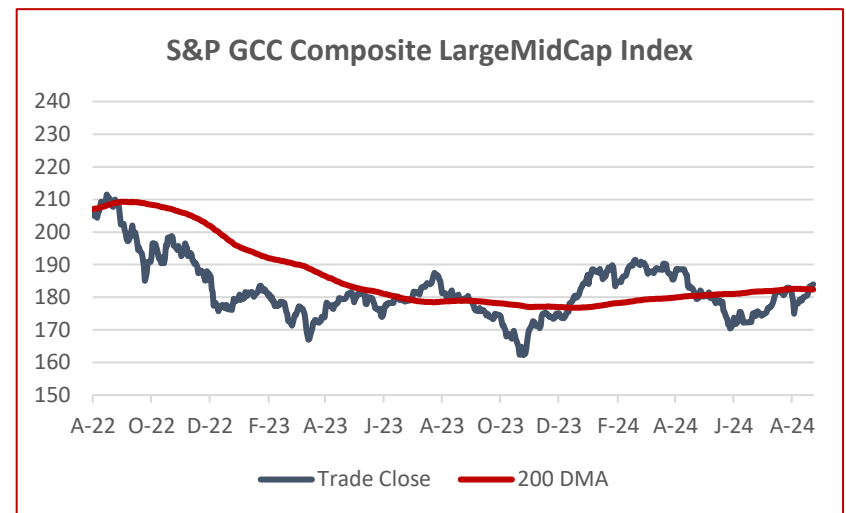


Sunday, September 29, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,271.8	-0.83	-0.83	1.04	5.07	2.54	3.10	23.60	3.34	10,142.55
Qatar (QE Index)	10,585.3	0.03	0.03	3.75	6.20	-2.27	1.23	11.98	4.22	537.08
Dubai (DFMGI)	4,521.3	-0.12	1.91	4.53	12.19	11.37	1.60	8.90	5.27	686.94
Abu Dhabi (ADI)	9,469.5	-0.47	0.33	1.99	4.51	-1.13	2.73	17.11	2.05	2,637.03
Bahrain (BAX)	2,013.7	-0.01	-0.01	2.87	-0.58	2.14	0.91	10.49	4.54	7.80
Muscat SE INDEX	4,734.7	0.70	0.70	-0.25	1.01	4.89	0.84	10.02	5.79	7.34
SP GCC Comp LMC	186.3	-0.68	-0.68	1.64	6.45	0.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.5	0.00	0.00	3.43	11.61	3.38				
Developed Markets										
MSCI World Index	3,726.8	0.17	1.36	1.79	6.12	17.60				
U.S. (S&P 500)	5,738.2	-0.13	0.62	1.59	5.09	20.30	4.76	27.40	1.55	51,043.26
U.K. (FTSE 100)	8,320.8	0.43	1.10	-0.67	1.92	7.60	1.78	15.12	3.68	2,167.19
Japan (topix)	2,740.9	0.73	3.73	1.04	-2.44	15.83	1.43	14.91	2.12	966,478.69
Emerging Markets										
MSCI EM Index	1,174.5	0.96	6.15	6.78	8.13	14.73				
China (SSE Composite)	3,087.5	2.88	12.81	8.63	4.05	3.78	1.36	12.00		44,025.04
India (Sensex)	85,571.9	-0.31	1.22	3.89	8.27	18.45	4.58	24.82	1.06	169,867.44

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,151.7	-0.63	-0.63	-0.41	3.09	4.90	1.48	15.48	3.69	43.32
Kuwait Premier Index	7,740.6	-0.63	-0.63	-1.04	2.61	3.53	1.59	16.67	3.47	35.61
Kuwait Main Index	6,232.7	-0.63	-0.63	2.67	5.42	11.90	1.10	11.29	4.78	7.71
Kuwait Sector										
Banking	1,761.8	-0.48	-0.48	-0.96	2.90	6.94	1.76	17.52	3.09	26.50
Telecom	1,031.4	-1.29	-1.29	1.75	4.85	-6.67	1.53	12.61	8.04	3.19
Industrials	728.7	-0.21	-0.21	-4.22	-5.68	-19.74	0.78	11.33	5.91	2.47
Financial Services	1,420.0	-0.31	-0.31	1.54	8.29	17.14	1.17	12.74	2.89	4.76
Real Estate	1,373.9	-1.21	-1.21	2.25	6.04	13.27	1.07	15.20	2.04	2.95
Basic Materials	812.4	0.18	0.18	-0.54	7.53	8.91	1.46	14.01	10.80	0.46
Health Care	472.3	0.00	0.00	6.98	6.93	-2.05	1.58	17.86	2.22	
Consumer Staples	999.7	0.10	0.10	0.79	21.27	51.80	2.17	20.59	2.06	0.30
Insurance	1,897.9	-4.57	-4.57	-3.25	-24.68	-17.22	1.08	10.77	3.99	0.80
Consumer Discretionary	1,794.7	-0.57	-0.57	1.20	16.54	11.90				
Energy	1,096.5	-1.72	-1.72	-0.23	6.43	15.54	0.95	9.48	5.68	0.23
Technology	1,418.6	-2.99	-2.99	-11.36	-10.55	145.28	1.70	609.09		0.02
Utilities	392.1	-1.32	-1.32	-2.61	-6.87	-13.87				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged higher on Monday on increasing concerns of potential supply disruptions from the Middle East producing region after Israel stepped up attacks on Iranian-backed forces. Brent crude futures for November delivery increased 16 cents, or 0.22%, to \$72.14 a barrel.

Kuwait Market

The market closed down by -0.63% at 7,151.7 value traded 60.9 million KD, Premier market value reached 22.7 million KD down by -0.63% at 7,740.6.

KSA Market

The market closed down by -0.83% at 12,271.8.

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	0.884	-0.56	-0.56	0.68	3.27	3.83	1.70	13.32	3.82	7.36
KFH	0.720	-0.41	-0.41	-0.96	2.13	8.10	2.09	20.18	2.66	12.32
ZAIN	0.475	-1.04	-1.04	1.71	6.50	-6.31	1.81	11.21	7.37	2.06
BOUBYAN BANK	0.574	-0.35	-0.35	-2.38	1.77	1.41	2.38	29.27	1.31	2.41
AGILITY	0.224	-2.18	-2.18	-12.50	-19.71	-20.91	0.67	7.41	8.93	0.60
Saudi Arabia										
ARAMCO	27.25	-1.27	-1.27	-2.50	-2.33	-17.42	4.43	15.32	6.97	6,594.32
SABIC	74.30	-0.80	-0.80	-0.67	0.68	-11.02	1.37	116.86	4.44	222.89
STC	43.95	-0.34	-0.34	2.21	15.35	11.70	2.88	16.01	3.64	219.74
AL-RAJHI BANK	88.10	-1.67	-1.67	0.00	10.13	1.85	3.08	21.60	2.72	352.39
NCB	35.00	-1.82	-1.82	0.00	-3.45	-9.44	1.18	10.90	5.14	209.99
Abu Dhabi										
ETISALAT.AD	18.76	-0.95	0.75	3.42	16.52	-4.48	3.76	14.85	4.34	163.15
FAB.AD	13.80	-1.15	1.62	2.99	10.75	-1.15	1.25	9.67	5.14	152.46
EMIRATES NBD	20.75	-0.72	1.97	5.33	25.76	19.94	1.13	5.86	5.78	131.07
DB ISLAMIC DB	6.36	-0.31	1.27	3.08	10.80	11.19	1.04	6.99	7.08	46.05
EMAR.DU	8.70	0.00	-0.34	3.08	6.10	9.85	0.99	6.40	5.75	76.90
Qatar										
QNB	16.820	-0.41	-0.41	6.19	14.81	1.75	1.43	10.46	3.89	155.36
INDUSTREIS QAT	12.920	-0.54	-0.54	0.16	0.31	-1.22	2.09	15.08	5.42	78.17
QA ISLAMIC BK	20.990	1.25	1.25	7.42	12.85	-2.37	1.65	11.67	2.92	49.60
MASRAF AL RAYA	2.480	0.65	0.65	7.83	6.48	-6.59	0.94	16.02	4.03	23.06
MESAIEED PETRO	1.639	-0.85	-0.85	-0.67	-0.36	-8.33	1.27	23.17	4.27	20.59
Oman										
BANK MUSCAT	0.254	-1.17	-1.17	-1.55	1.20	-3.79	0.82	9.79	6.10	1.90
OMANTEL	0.988	0.82	0.82	-2.08	-2.66	-6.79	1.18	11.46	6.07	0.74
BANK DHOFAR	0.165	5.10	5.10	4.43	0.00	3.13	0.65	14.83	4.70	0.49
NAT BANK OF OMAN	0.290	0.00	0.00	7.41	14.62	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.350	-0.57	-0.57	6.06	-1.41	-11.46	0.78	8.49	5.71	0.23

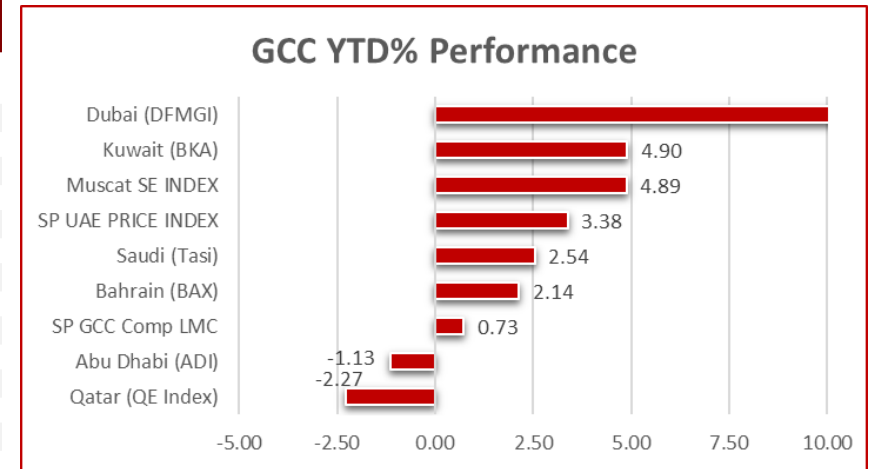
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%
25-Sept. 24	24.33%	15.45%	0.06%	3.67%	7.93%	17.59%	13.03%	5.98%	5.79%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.63 %The leading sector bottom performance indices today are Insurance -4.57 % Technology -2.99 % Energy -1.72 % respectively.

KSA

Saudi Armco have negative performance today by -1.27 %, SABIC have negative performance today by -0.8%, STC have negative performance today by -0.34 %, Al Rajhi Bank have negative performance today by -1.67 %.



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