

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 29th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

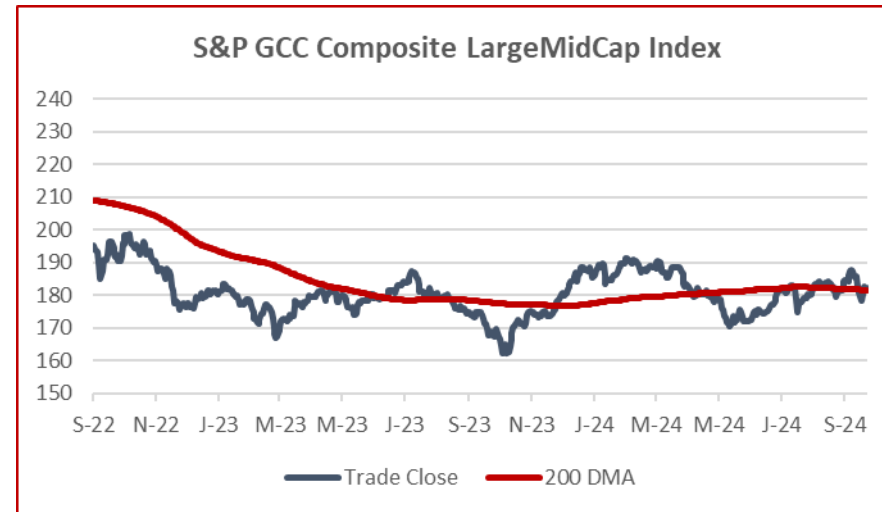


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,053.2	-0.13	1.41	-1.41	-1.41	0.72	3.04	22.79	3.02	10,022.05
Qatar (QE Index)	10,504.3	-0.53	1.00	-1.03	-1.03	-3.01	1.23	11.75	4.26	533.19
Dubai (DFMGI)	4,536.9	1.29	1.29	0.74	0.74	11.75	1.60	8.94	5.27	682.26
Abu Dhabi (ADI)	9,307.7	1.13	1.13	-1.25	-1.25	-2.82	2.70	16.76	2.06	2,625.20
Bahrain (BAX)	2,012.1	0.56	0.52	-0.03	-0.03	2.06	0.92	10.54	4.52	7.79
Muscat SE INDEX	4,795.0	-0.33	-0.64	1.80	1.80	6.22	0.85	10.18	5.74	7.45
SP GCC Comp LMC	183.4	0.25	1.51	-1.20	-1.20	-0.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.4	2.08	2.08	-1.09	-1.09	1.87				

Developed Markets										
MSCI World Index	3,716.6	0.29	0.29	-0.17	-0.17	17.27				
U.S. (S&P 500)	5,808.1	-0.03	-0.96	0.79	0.79	21.77	4.82	28.11	1.54	51,691.19
U.K. (FTSE 100)	8,285.6	0.45	0.45	0.59	0.59	7.14	1.73	15.03	3.70	2,151.44
Japan (topix)	2,657.8	1.51	1.51	0.45	0.45	12.31	1.38	14.45	2.19	936,521.65
Emerging Markets										
MSCI EM Index	1,137.9	0.27	0.27	-2.81	-2.81	11.15				
China (SSE Composite)	3,322.2	0.68	0.68	-0.43	-0.43	11.67	1.36	12.00		44,025.04
India (Sensex)	80,005.0	0.76	0.76	-5.09	-5.09	10.75	4.27	22.98	1.15	157,802.84

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,097.1	0.13	1.66	-0.55	-0.55	4.10	1.45	15.03	3.97	42.68
Kuwait Premier Index	7,610.3	0.21	2.01	-1.28	-1.28	1.78	1.55	15.95	3.84	34.73
Kuwait Main Index	6,453.8	-0.23	0.12	2.82	2.82	15.87	1.14	11.73	4.64	7.96
Kuwait Sector										
Banking	1,733.4	0.09	1.60	-1.13	-1.13	5.22	1.72	16.77	3.16	25.94
Telecom	1,021.1	0.82	2.98	-0.68	-0.68	-7.60	1.48	12.23	8.30	3.10
Industrials	688.8	0.35	2.68	-5.07	-5.07	-24.13	0.73	10.65	10.29	2.33
Financial Services	1,434.4	0.10	2.07	1.68	1.68	18.33	1.17	12.79	2.87	4.79
Real Estate	1,413.0	0.70	1.62	2.72	2.72	16.50	1.08	15.32	2.03	2.98
Basic Materials	824.6	0.55	1.37	2.14	2.14	10.54	1.47	12.44	10.68	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,029.5	0.23	0.47	2.56	2.56	56.33	2.23	21.18	2.00	0.31
Insurance	1,930.7	-4.71	-4.47	-7.35	-7.35	-15.79	1.10	11.04	3.92	0.82
Consumer Discretionary	1,946.0	0.31	1.15	7.74	7.74	21.33				
Energy	1,146.4	3.33	1.44	2.58	2.58	20.80	0.95	9.42	5.71	0.23
Technology	1,105.8	1.33	-0.65	-23.62	-23.62	91.20	1.27	454.55		0.02
Utilities	379.0	-0.69	0.00	-2.70	-2.70	-16.76				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged up on Tuesday, after a sharp plunge in the previous session, as a U.S. plan to purchase oil for the Strategic Petroleum Reserve provided support while investors remained focused on developments in the Middle East. Brent crude futures climbed 44 cents, or 0.6%, to \$71.86 a barrel.

Kuwait Market

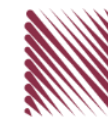
The market up by 0.13% at 7,097.10 value traded 84.2 million KD, Premier market value reached 42.1 million KD up by 0.21% at 7,610.31

KSA Market

The market closed down by -0.13% at 12,053.2

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	0.852	-0.23	1.43	-3.51	-3.51	0.07	1.60	12.56	3.97	7.09
KFH	0.716	0.14	1.56	0.00	0.00	7.50	2.06	19.52	2.68	12.24
ZAIN	0.462	0.87	3.59	-2.74	-2.74	-8.88	1.74	10.79	7.58	2.00
BOUBYAN BANK	0.544	0.00	1.87	-4.56	-4.56	-3.89	2.20	26.32	1.39	2.28
AGILITY	0.246	0.82	5.58	12.33	12.33	-13.14	0.72	7.96	8.13	0.66
Saudi Arabia										
ARAMCO	27.00	-0.18	-0.18	-0.37	-0.37	-18.18	4.33	14.98	7.04	6,536.44
SABIC	73.00	-0.54	0.55	-2.54	-2.54	-12.57	1.34	113.90	4.52	219.08
STC	42.50	0.12	0.95	-2.75	-2.75	8.01	2.77	15.43	3.76	212.58
AL-RAJHI BANK	87.00	0.58	2.47	-0.23	-0.23	0.58	2.99	20.98	2.76	348.13
NCB	34.15	-2.01	-0.58	-0.44	-0.44	-11.64	1.13	10.44	5.27	204.98
Abu Dhabi										
ETISALAT.AD	17.66	2.79	2.79	-4.54	-4.54	-10.08	3.50	13.85	4.61	153.60
FAB.AD	13.40	1.98	1.98	-2.47	-2.47	-4.01	1.15	9.17	5.30	148.05
EMIRATES NBD	19.05	-0.26	-0.26	-6.16	-6.16	10.12	0.98	5.34	6.30	120.34
DB ISLAMIC DB	6.21	1.80	1.80	-1.43	-1.43	8.57	1.01	6.81	7.25	44.97
EMAR.DU	8.84	3.63	3.63	1.38	1.38	11.62	1.01	6.50	5.66	78.14
Qatar										
QNB	17.210	-0.52	0.06	1.53	1.53	4.11	1.42	10.46	3.81	158.96
INDUSTREIS QAT	13.450	-1.25	0.45	3.14	3.14	2.83	2.17	15.61	5.20	81.37
QA ISLAMIC BK	20.550	-0.29	1.23	-3.75	-3.75	-4.42	1.60	11.30	2.98	48.56
MASRAF AL RAYA	2.388	-0.67	1.92	-3.32	-3.32	-10.06	0.89	15.25	4.19	22.21
MESAIEED PETRO	1.600	-1.05	0.95	-1.84	-1.84	-10.51	1.23	22.43	4.38	20.10
Oman										
BANK MUSCAT	0.259	-1.52	-1.89	2.78	2.78	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.991	-0.60	-0.50	0.41	0.41	-6.51	1.20	11.59	6.05	0.74
BANK DHOFAR	0.176	0.00	0.00	12.10	12.10	10.00	0.72	19.73	4.40	0.53
NAT BANK OF OMAN	0.300	0.00	0.00	3.45	3.45	7.14	0.71	10.41	2.83	0.49
OMINVEST	0.372	-0.53	-0.53	5.68	5.68	-5.89	0.82	8.97	5.38	0.25

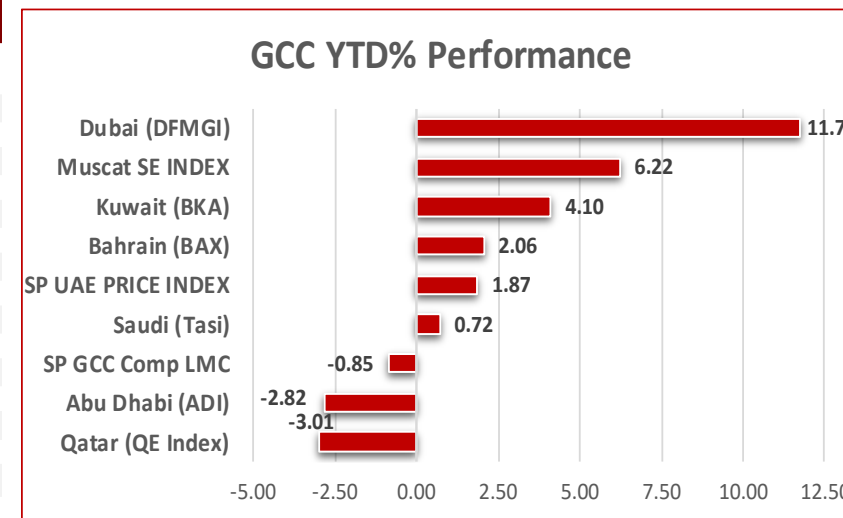
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
16-October. 24	24.73%	15.75%	0.06%	3.72%	7.91%	17.62%	12.98%	6.18%	5.85%
23-October. 24	24.71%	15.85%	0.06%	3.71%	7.76%	17.64%	13.00%	6.16%	5.87%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.13 %The leading sector best performance indices today are Energy 3.33 % Technology 1.33 % Telecom 0.82 % respectively

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have negative performance today by -0.54 %. STC has a positive performance today by + 0.12 %, Al Rajhi Bank has a positive performance today by + 0.58 %



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