

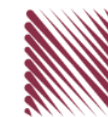


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 2nd July 2024

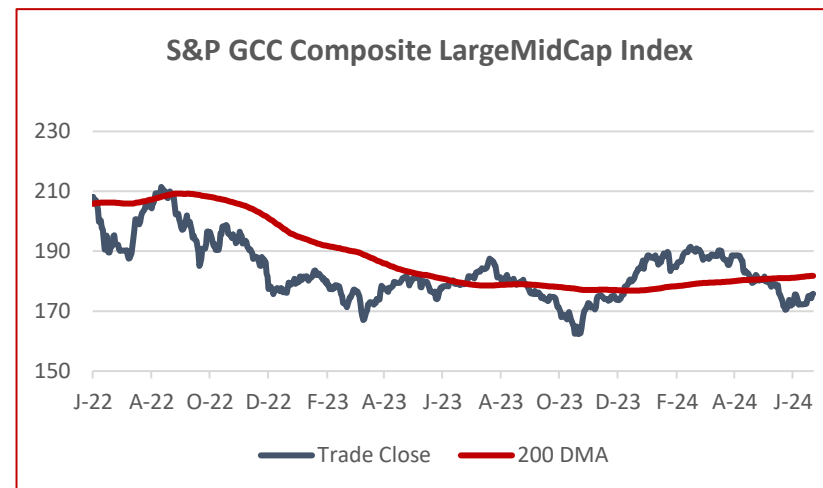




Tuesday, July 2, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,606.1	-0.45	-1.05	-0.63	-0.63	-3.02	3.04	24.05	3.32	10,061.73
Qatar (QE Index)	10,006.1	0.00	0.45	0.39	0.39	-7.61	1.16	11.40	4.73	503.46
Dubai (DFMGI)	4,063.3	0.15	0.83	0.83	0.83	0.08	1.41	8.32	5.94	603.59
Abu Dhabi (ADI)	9,087.8	0.31	0.30	0.30	0.30	-5.12	2.62	16.33	2.11	2,540.33
Bahrain (BAX)	2,015.7	-0.07	-0.74	-0.48	-0.48	2.24	0.86	10.92	4.31	7.95
Muscat SE INDEX	4,684.2	-0.25	-0.08	-0.06	-0.06	3.77	0.80	10.01	5.85	6.45
SP GCC Comp LMC	174.4	-0.34	-0.81	-0.37	-0.37	-5.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.3	0.08	0.51	0.51	0.51	-6.90				
Developed Markets										
MSCI World Index	3,537.5	0.50	0.73	0.73	0.73	11.62				
U.S. (S&P 500)	5,509.0	0.62	0.89	0.89	0.89	15.50	4.55	26.84	1.61	48,596.37
U.K. (FTSE 100)	8,121.2	-0.56	-0.53	-0.53	-0.53	5.02	1.72	14.61	3.75	2,122.12
Japan (topix)	2,856.6	1.15	1.67	1.67	1.67	20.72	1.49	15.82	2.02	1,003,106.54
Emerging Markets										
MSCI EM Index	1,079.8	-0.70	-0.60	-0.60	-0.60	5.47				
China (SSE Composite)	2,997.0	0.08	1.00	1.00	1.00	0.74	1.36	12.00		44,025.04
India (Sensex)	79,441.5	-0.04	0.52	0.52	0.52	9.97	5.01	23.61	1.12	156,593.79
Kuwait										
Kuwait All Share Index	6,937.1	-0.08	-0.43	0.00	0.00	1.76	1.42	14.89	3.70	41.79
Kuwait Premier Index	7,538.2	-0.02	-0.50	-0.07	-0.07	0.82	1.54	16.20	3.52	34.48
Kuwait Main Index	5,933.8	-0.39	-0.08	0.36	0.36	6.54	1.04	10.39	4.56	7.31
Kuwait Sector										
Banking	1,710.1	-0.15	-0.81	-0.11	-0.11	3.80	1.70	17.00	3.10	25.65
Telecom	983.5	-0.05	0.18	-0.01	-0.01	-11.00	1.44	11.73	8.54	3.01
Industrials	775.2	0.07	1.60	0.34	0.34	-14.61	0.82	11.53	5.57	2.62
Financial Services	1,310.8	0.38	0.09	-0.04	-0.04	8.13	1.06	11.78	3.06	4.35
Real Estate	1,303.0	0.10	0.57	0.57	0.57	7.43	1.00	13.97	2.10	2.77
Basic Materials	748.8	-0.95	-1.52	-0.89	-0.89	0.39	1.36	13.26	11.59	0.43
Health Care	441.6	0.00	0.00	0.00	0.00	-8.40	1.57	10.39	1.95	
Consumer Staples	831.9	-2.41	1.46	0.92	0.92	26.32	1.85	18.92	2.41	0.26
Insurance	2,535.4	-0.62	-1.52	0.62	0.62	10.58	1.39	12.55	3.11	1.03
Consumer Discretionary	1,533.9	-0.10	-2.10	-0.39	-0.39	-4.37				
Energy	1,042.1	-0.68	-0.05	1.16	1.16	9.81	0.90	9.72	6.44	0.21
Technology	1,673.3	2.68	3.14	5.50	5.50	189.31	1.89	269.88		0.02
Utilities	429.0	1.88	2.52	1.88	1.88	-5.78				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged higher in early Asian trade on Wednesday after industry data showed a bigger-than-expected draw in U.S. crude stockpiles, boosting hopes of solid fuel demand during the summer driving season in the top oil consuming nation. Brent crude oil futures climbed 16 cents, or 0.2%, to \$85.60 a barrel.

Kuwait Market

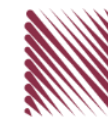
The market closed down by – 0.08% at 6,937.1 value traded 32.4 million KD, Premier market value reached 26.6 million KD down by - 0.02% at 7,538.2.

KSA Market

The market closed down by - 0.45% at 11,606.1.

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	0.848	-0.35	-1.62	-0.93	-0.93	-0.40	1.67	12.81	3.93	7.07
KFH	0.706	0.00	-0.56	0.14	0.14	6.00	2.07	20.78	2.60	12.10
ZAIN	0.448	0.45	0.67	0.45	0.45	-11.64	1.56	10.17	7.81	1.94
BOUBYAN BANK	0.562	-0.18	-0.71	-0.35	-0.35	-0.71	2.36	29.99	1.34	2.36
AGILITY	0.278	-0.71	1.09	-0.36	-0.36	-1.84	0.75	8.16	7.19	0.75
Saudi Arabia										
ARAMCO	28.05	0.18	1.26	0.54	0.54	-15.00	4.45	15.47	6.68	6,774.01
SABIC	74.00	0.00	0.68	0.27	0.27	-11.38	1.33	194.11	4.46	221.93
STC	37.65	-0.92	0.40	-1.18	-1.18	-4.31	2.33	13.97	4.25	189.94
AL-RAJHI BANK	79.60	-0.50	-2.33	-0.50	-0.50	-7.98	2.94	19.84	2.89	319.91
NCB	35.70	-1.24	-2.72	-1.52	-1.52	-7.63	1.18	11.02	4.90	216.84
Abu Dhabi										
ETISALAT.AD	16.22	0.75	0.75	0.75	0.75	-17.41	3.24	13.50	4.93	141.05
FAB.AD	12.60	0.64	1.12	1.12	1.12	-9.74	1.16	8.75	5.63	139.19
EMIRATES NBD	16.55	0.91	0.30	0.30	0.30	-4.34	0.97	4.82	7.25	104.53
DB ISLAMIC DB	5.75	-0.17	0.17	0.17	0.17	0.52	0.97	6.40	7.83	41.63
EMAR.DU	8.14	-1.09	-0.73	-0.73	-0.73	2.78	0.91	6.34	6.14	71.94
Qatar										
QNB	14.780	0.41	1.16	0.89	0.89	-10.59	1.31	9.34	4.40	136.51
INDUSTREIS QAT	12.990	0.31	1.48	0.85	0.85	-0.69	2.15	16.26	6.00	78.59
QA ISLAMIC BK	19.000	0.64	2.15	2.15	2.15	-11.63	1.57	10.85	3.82	44.90
MASRAF AL RAYA	2.281	-0.78	-2.23	-2.06	-2.06	-14.09	0.88	14.87	4.38	21.21
MESAIEED PETRO	1.644	-0.36	-0.12	-0.06	-0.06	-8.05	1.28	20.49	5.23	20.65
Oman										
BANK MUSCAT	0.25	-0.40	0.00	-0.40	-0.40	-5.30	0.82	9.75	6.20	1.88
OMANTEL	1.012	0.10	1.20	-0.30	-0.30	-4.53	1.24	11.42	5.93	0.76
BANK DHOFAR	0.160	0.00	-3.03	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.255	0.00	0.00	0.79	0.79	-8.93	0.61	8.93	3.33	0.41
OMINVEST	0.340	-4.23	-5.56	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

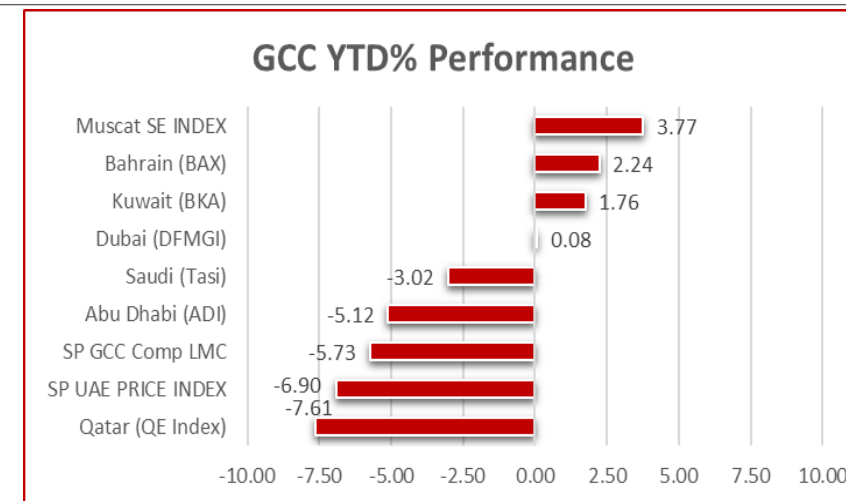
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
19-June-24	24.49%	13.73%	0.06%	2.35%	6.24%	17.72%	13.06%	6.05%	5.59%
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%

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 down today by -0.08 %The leading sector bottom performance indices today are Consumer services -2.41 % Basic materials -0.95 % Energy -0.68 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC flat performance today 0 %, STC have negative performance today by -0.92 %, Al Rajhi Bank have negative performance today by -0.5 %.



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