

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 2nd September 2024





Monday, September 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)	12,167.5	-0.18	0.18	0.18	4.18	1.67	3.09	23.50	3.35	10,228.63
Qatar (QE Index)	10,344.4	1.11	1.39	1.39	3.78	-4.49	1.20	11.68	4.33	523.67
Dubai (DFMGI)	4,356.8	0.72	0.72	0.72	8.11	7.31	1.53	8.53	5.52	656.01
Abu Dhabi (ADI)	9,363.0	0.84	0.84	0.84	3.34	-2.24	2.70	13.38	2.06	2,580.51
Bahrain (BAX)	1,948.9	-0.38	-0.44	-0.44	-3.78	-1.15	0.87	9.97	4.75	7.53
Muscat SE INDEX	4,771.8	0.25	0.53	0.53	1.80	5.71	0.85	10.16	5.71	7.45
SP GCC Comp LMC	183.8	0.04	0.28	0.28	5.02	-0.62	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.8	0.75	0.75	0.75	8.71	0.70				
Developed Markets										
MSCI World Index	3,659.4	-0.05	-0.05	-0.05	4.20	15.47				
U.S. (S&P 500)	5,648.4	0.00	0.00	0.00	3.44	18.42	4.68	26.82	1.56	49,974.72
U.K. (FTSE 100)	8,363.8	-0.15	-0.15	-0.15	2.45	8.15	1.79	15.22	3.64	2,176.65
Japan (topix)	2,716.0	0.12	0.12	0.12	-3.33	14.77	1.42	14.79	2.14	956,760.21
Emerging Markets										
MSCI EM Index	1,096.3	-0.33	-0.33	-0.33	0.93	7.09				
China (SSE Composite)	2,811.0	-1.10	-1.10	-1.10	-5.27	-5.51	1.36	12.00		44,025.04
India (Sensex)	82,559.8	0.24	0.24	0.24	4.46	14.29	4.41	23.95	1.11	164,777.32

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,169.1	-0.05	-0.16	-0.16	3.35	5.16	1.47	15.43	3.70	43.17
Kuwait Premier Index	7,803.3	-0.03	-0.24	-0.24	3.44	4.36	1.59	16.71	3.47	35.68
Kuwait Main Index	6,083.0	-0.13	0.20	0.20	2.88	9.21	1.07	10.94	4.88	7.49
Kuwait Sector										
Banking	1,767.0	-0.19	-0.66	-0.66	3.21	7.26	1.76	17.52	3.09	26.51
Telecom	1,026.8	0.44	1.30	1.30	4.39	-7.09	1.50	12.34	8.22	3.12
Industrials	763.0	0.19	0.28	0.28	-1.25	-15.96	0.81	11.85	5.67	2.58
Financial Services	1,404.2	0.17	0.41	0.41	7.08	15.83	1.15	12.52	2.93	4.69
Real Estate	1,342.2	-0.48	-0.11	-0.11	3.59	10.66	1.04	14.67	2.09	2.86
Basic Materials	815.4	0.75	-0.17	-0.17	7.93	9.31	1.46	13.98	10.82	0.46
Health Care	471.4	6.90	6.79	6.79	6.74	-2.23	1.47	16.68	2.38	
Consumer Staples	1,009.3	-0.10	1.76	1.76	22.43	53.26	2.19	20.83	2.03	0.31
Insurance	2,000.5	-0.07	1.98	1.98	-20.61	-12.75	1.09	10.93	3.96	0.81
Consumer Discretionary	1,785.3	0.34	0.67	0.67	15.93	11.31				
Energy	1,088.2	-1.31	-0.99	-0.99	5.62	14.66	0.94	9.51	5.75	0.22
Technology	1,600.5	0.00	0.00	0.00	0.92	176.73	1.86	666.67		0.02
Utilities	402.6	0.00	0.00	0.00	-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

Brent oil prices slid in Asian trade on Tuesday as concern about a sluggish economy in China bringing down demand outweighed the impact of a blockade of oil production facilities in Libya. Brent crude futures were down 37 cents, or 0.48%, to \$77.15 a barrel.

Kuwait Market

The market closed down by -0.05% at 7,169.1 value traded 60.3 million KD, Premier market value reached 38.5 million KD down by -0.03% at 7,803.0.

KSA Market

The market closed down by -0.18% at 12,167.5.

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	0.873	-0.11	-0.57	-0.57	1.99	2.53	1.67	13.08	3.87	7.28
KFH	0.724	0.14	-0.41	-0.41	2.70	8.70	2.09	20.21	2.65	12.41
ZAIN	0.477	0.63	2.14	2.14	6.95	-5.92	1.80	11.14	7.34	2.07
BOUBYAN BANK	0.588	-0.34	0.00	0.00	4.26	3.88	2.43	29.88	1.28	2.47
AGILITY	0.253	0.00	-1.17	-1.17	-9.32	-10.67	0.74	8.19	7.91	0.68
Saudi Arabia										
ARAMCO	27.90	0.18	-0.18	-0.18	0.00	-15.45	4.47	15.48	6.81	6,751.80
SABIC	75.50	0.00	0.94	0.94	2.30	-9.58	1.38	117.80	4.37	226.50
STC	43.30	0.00	0.70	0.70	13.65	10.05	2.83	15.72	3.70	216.50
AL-RAJHI BANK	87.50	-1.46	-0.68	-0.68	9.38	1.16	3.01	21.10	2.74	350.00
NCB	34.95	-0.71	-0.14	-0.14	-3.59	-9.57	1.16	10.69	5.15	209.70
Abu Dhabi										
ETISALAT.AD	18.04	-0.55	-0.55	-0.55	12.05	-8.15	3.58	14.15	4.52	156.89
FAB.AD	13.44	0.30	0.30	0.30	7.87	-3.72	1.21	9.31	5.28	148.48
EMIRATES NBD	20.00	1.52	1.52	1.52	21.21	15.61	1.09	5.61	6.00	126.33
DB ISLAMIC DB	6.20	0.49	0.49	0.49	8.01	8.39	1.01	6.80	7.26	44.89
EMAR.DU	8.71	3.20	3.20	3.20	6.22	9.97	1.00	6.40	5.74	76.98
Qatar										
QNB	16.000	0.82	1.01	1.01	9.22	-3.21	1.36	9.91	4.09	147.78
INDUSTREIS QAT	13.060	0.85	1.24	1.24	1.40	-0.15	2.10	15.16	5.36	79.01
QA ISLAMIC BK	20.060	2.56	2.66	2.66	7.85	-6.70	1.59	11.30	3.05	47.40
MASRAF AL RAYA	2.361	1.11	2.65	2.65	1.37	-11.07	0.90	15.35	4.24	21.96
MESAIEED PETRO	1.679	1.39	1.76	1.76	2.07	-6.10	1.29	23.54	4.17	21.09
Oman										
BANK MUSCAT	0.263	1.15	1.94	1.94	4.78	-0.38	0.84	10.02	5.89	1.97
OMANTEL	1.018	-0.20	0.89	0.89	0.30	-3.96	1.23	11.91	5.89	0.76
BANK DHOFAR	0.158	0.00	0.00	0.00	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.270	0.00	0.00	0.00	6.72	-3.57	0.64	9.37	3.15	0.44
OMINVEST	0.342	2.09	3.64	3.64	-3.66	-13.48	0.76	8.24	5.85	0.23

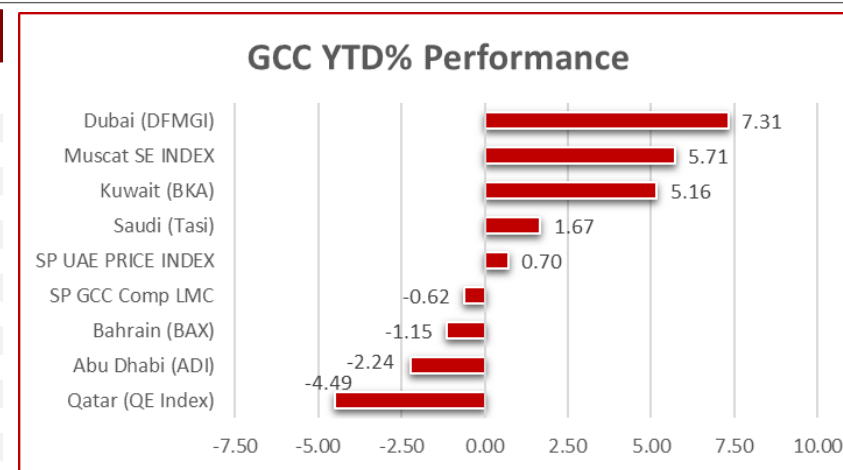
* GCC Markets performance at the latest close.

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



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Leading Sector, Security Performance

Kuwait

The market is down today by -0.05 %The leading sector bottom performance indices today are Energy -1.31 % Real estate -0.48 % Banking -0.19 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC flat performance today 0 %, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by - 1.46 %.



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