



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday ,30th July 2024





Tuesday, July 30, 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)	12,064.7	-0.47	0.32	3.30	3.30	0.81	3.17	25.08	3.19	10,132.55
Qatar (QE Index)	10,150.5	-0.19	0.52	1.83	1.83	-6.28	1.17	11.71	4.62	511.97
Dubai (DFMGI)	4,284.0	-0.57	0.09	6.30	6.30	5.52	1.50	8.69	5.63	641.61
Abu Dhabi (ADI)	9,396.5	0.01	0.84	3.71	3.71	-1.89	2.71	16.63	2.04	2,610.25
Bahrain (BAX)	1,978.6	0.33	0.17	-2.32	-2.32	0.36	0.88	11.18	4.58	7.65
Muscat SE INDEX	4,664.1	0.26	0.16	-0.49	-0.49	3.32	0.83	9.93	5.86	7.25
SP GCC Comp LMC	182.5	-0.31	0.84	4.26	4.26	-1.34	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.1	0.01	1.52	7.37	7.37	-0.55				
Developed Markets										
MSCI World Index	3,514.4	-0.34	-0.28	0.07	0.07	10.89				
U.S. (S&P 500)	5,436.4	-0.50	-0.42	-0.44	-0.44	13.98	4.56	26.54	1.62	48,419.78
U.K. (FTSE 100)	8,274.4	-0.22	-0.14	1.35	1.35	7.00	1.75	15.10	3.69	2,155.69
Japan (topix)	2,754.5	-0.19	2.03	-1.96	-1.96	16.40	1.44	15.21	2.10	968,825.54
Emerging Markets										
MSCI EM Index	1,071.6	-0.53	-0.06	-1.35	-1.35	4.67				
China (SSE Composite)	2,879.3	-0.43	-0.40	-2.97	-2.97	-3.21	1.36	12.00		44,025.04
India (Sensex)	81,455.4	0.12	0.15	3.07	3.07	12.76	4.54	23.97	1.12	161,726.52
Kuwait										
Kuwait All Share Index	7,186.7	-0.06	0.44	3.60	3.60	5.42	1.47	15.35	3.61	43.31
Kuwait Premier Index	7,841.4	-0.07	0.52	3.95	3.95	4.87	1.60	16.75	3.43	35.89
Kuwait Main Index	6,026.5	0.03	0.08	1.93	1.93	8.20	1.06	10.51	4.48	7.42
Kuwait Sector										
Banking	1,783.3	0.14	1.00	4.16	4.16	8.25	1.77	17.61	3.05	26.67
Telecom	990.3	-0.68	-0.69	0.67	0.67	-10.39	1.46	11.79	8.43	3.05
Industrials	788.8	0.25	-0.47	2.10	2.10	-13.11	0.84	11.71	5.49	2.66
Financial Services	1,368.4	-0.32	0.51	4.35	4.35	12.88	1.12	12.33	2.90	4.60
Real Estate	1,339.6	-0.56	-0.25	3.40	3.40	10.45	1.03	14.48	2.02	2.86
Basic Materials	752.9	0.63	0.74	-0.35	-0.35	0.93	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	1,027.8	-4.64	-10.31	24.68	24.68	56.06	2.34	23.92	1.91	0.33
Insurance	2,212.2	-0.85	-3.96	-12.20	-12.20	-3.52	1.22	10.95	3.56	0.90
Consumer Discretionary	1,712.3	0.58	1.23	11.19	11.19	6.76				
Energy	1,075.8	-0.65	2.36	4.42	4.42	13.36	0.92	10.07	6.19	0.22
Technology	1,629.6	8.74	0.90	2.75	2.75	181.76	1.74	248.19		0.02
Utilities	426.3	-1.22	-1.22	1.25	1.25	-6.36				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil futures clawed back some losses on Wednesday, recovering from 7-week lows as geopolitical tensions rose after Israel retaliated against an attack by Hezbollah, although prices remained under pressure from concerns about demand in China. Brent crude futures climbed 39 cents, or 0.5%, to \$79.02 a barrel.

Kuwait Market

The market closed down by -0.06% at 7,186.7 value traded 54.1 million KD, Premier market value reached 44.5 million KD down by -0.07% at 7,841.4.

KSA Market

The market closed down by -0.47% at 12,064.7.

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	0.876	-0.23	0.34	2.34	2.34	2.89	1.67	13.13	3.86	7.32
KFH	0.739	-0.27	0.82	4.82	4.82	10.95	2.13	20.63	2.59	12.69
ZAIN	0.452	-0.88	-0.66	1.35	1.35	-10.85	1.57	10.27	7.74	1.96
BOUBYAN BANK	0.572	0.18	0.00	1.42	1.42	1.05	2.36	29.07	1.32	2.41
AGILITY	0.279	0.00	-1.41	0.00	0.00	-1.49	0.75	8.19	7.17	0.75
Saudi Arabia										
ARAMCO	27.65	-0.90	-1.25	-0.90	-0.90	-16.21	4.39	15.25	6.78	6,689.69
SABIC	78.70	-0.38	1.16	6.64	6.64	-5.75	1.41	206.44	4.19	236.04
STC	38.60	-0.77	-1.40	1.31	1.31	-1.90	2.39	14.33	4.15	192.95
AL-RAJHI BANK	85.00	-0.12	1.80	6.25	6.25	-1.73	3.14	21.19	2.71	339.92
NCB	37.50	0.27	1.08	3.45	3.45	-2.98	1.24	11.58	4.67	224.95
Abu Dhabi										
ETISALAT.AD	16.70	-3.13	-3.24	3.73	3.73	-14.97	3.33	13.90	4.79	145.21
FAB.AD	13.18	-1.64	4.60	5.78	5.78	-5.59	1.18	9.13	5.39	145.58
EMIRATES NBD	18.75	0.00	1.63	13.64	13.64	8.38	1.02	5.26	6.40	118.42
DB ISLAMIC DB	5.98	0.17	1.01	4.18	4.18	4.55	0.98	6.55	7.53	43.29
EMAR.DU	9.06	1.12	3.78	10.49	10.49	14.39	1.01	7.06	5.52	80.07
Qatar										
QNB	15.330	-0.13	0.39	4.64	4.64	-7.26	1.30	9.49	4.27	141.57
INDUSTREIS QAT	13.030	-0.53	-0.53	1.16	1.16	-0.38	2.16	16.31	5.99	78.82
QA ISLAMIC BK	19.450	0.36	1.46	4.57	4.57	-9.53	1.55	10.95	3.15	45.95
MASRAF AL RAYA	2.324	-0.26	-0.26	-0.21	-0.21	-12.47	0.89	15.11	4.30	21.61
MESAIEED PETRO	1.680	-0.47	0.90	2.13	2.13	-6.04	1.30	20.94	5.12	21.10
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.40	0.40	-4.55	0.82	9.83	6.15	1.89
OMANTEL	1.000	1.42	0.00	-1.48	-1.48	-5.66	1.22	11.29	6.00	0.75
BANK DHO FAR	0.154	0.00	0.00	-6.67	-6.67	-3.75	0.64	14.54	5.03	0.46
NAT BANK OF OMAN	0.265	1.92	1.92	4.74	4.74	-5.36	0.64	9.28	3.21	0.43
OMINVEST	0.340	0.00	0.00	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

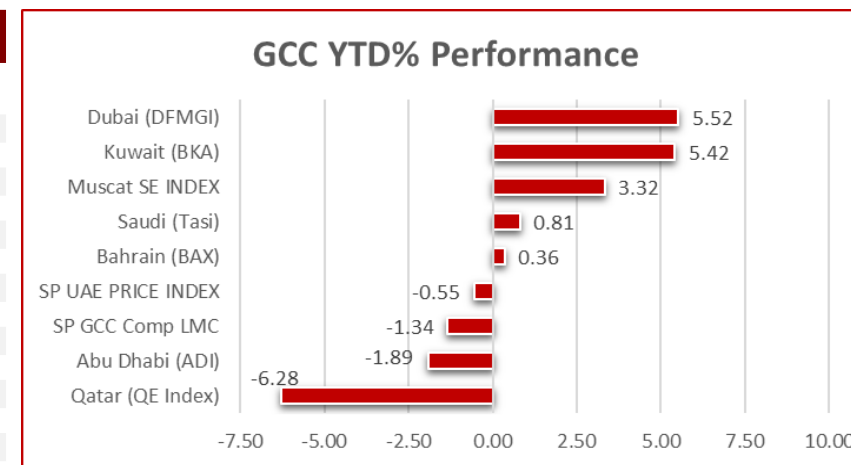
* GCC Markets performance at the latest close.

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

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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 -0.06 %The leading sector bottom performance indices today are Consumer services -4.64 % Utilities -1.22 % Insurance -0.85 % respectively.

KSA

Saudi Armco have negative performance today by -0.9 %, SABIC have negative performance today by -0.37%, STC have negative performance today by -0.77 %, Al Rajhi Bank have negative performance today by -0.12 %.



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