

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 30th June 2024





Sunday, June 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)	11,679.5	-0.43	-0.43	1.53	-5.82	-2.41	2.97	23.47	3.29	10,055.49
Qatar (QE Index)	9,967.6	0.06	0.06	6.96	1.22	-7.97	1.15	11.37	4.75	501.32
Dubai (DFMGI)	4,030.0	0.52	0.44	1.31	-5.09	-0.73	1.40	8.23	5.99	596.26
Abu Dhabi (ADI)	9,060.7	0.63	0.53	2.24	-1.81	-5.40	2.61	16.28	2.12	2,549.81
Bahrain (BAX)	2,025.5	-0.26	-0.26	-0.66	-0.84	2.74	0.87	10.98	4.29	7.99
Muscat SE INDEX	4,687.3	-0.01	-0.01	-3.27	1.11	3.84	0.80	10.02	5.84	6.46
SP GCC Comp LMC	175.0	-0.44	-0.44	2.59	-5.60	-5.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	127.7	0.00	0.00	2.94	-5.18	-7.37				
Developed Markets										
MSCI World Index	3,511.8	-0.29	0.11	1.93	2.15	10.81				
U.S. (S&P 500)	5,460.5	-0.41	-0.08	3.47	3.92	14.48	4.54	26.77	1.61	48,454.96
U.K. (FTSE 100)	8,164.1	-0.19	-0.89	-1.34	2.66	5.57	1.72	14.69	3.74	2,134.23
Japan (topix)	2,809.6	0.57	3.12	1.34	1.48	18.73	1.47	15.56	2.06	988,048.11
Emerging Markets										
MSCI EM Index	1,086.2	0.41	-0.06	3.55	4.13	6.11				
China (SSE Composite)	2,967.4	0.73	-1.03	-3.87	-2.43	-0.25	1.36	12.00		44,025.04
India (Sensex)	79,032.7	-0.27	2.36	6.86	7.31	9.40	4.99	23.48	1.12	155,951.84
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,937.0	-0.43	-0.43	-1.63	-5.33	1.76	1.43	14.93	3.68	41.93
Kuwait Premier Index	7,543.6	-0.43	-0.43	-1.81	-6.13	0.89	1.55	16.28	3.50	34.64
Kuwait Main Index	5,912.4	-0.44	-0.44	-0.76	-1.22	6.15	1.04	10.34	4.57	7.29
Kuwait Sector										
Banking	1,712.1	-0.70	-0.70	-1.70	-3.36	3.92	1.71	17.12	3.08	25.82
Telecom	983.7	0.19	0.19	-1.34	-7.64	-10.99	1.44	11.71	8.56	3.00
Industrials	772.6	1.26	1.26	4.19	-26.09	-14.90	0.80	11.35	5.66	2.58
Financial Services	1,311.3	0.13	0.13	-3.61	-3.12	8.17	1.07	11.77	3.04	4.36
Real Estate	1,295.6	0.00	0.00	-2.32	0.00	6.82	0.99	13.91	2.11	2.75
Basic Materials	755.5	-0.64	-0.64	-10.08	-4.36	1.28	1.37	13.33	11.52	0.43
Health Care	441.6	0.00	0.00	-0.96	28.53	-8.40	1.57	10.39	1.95	
Consumer Staples	824.4	0.54	0.54	-5.98	6.69	25.18	1.78	18.20	2.51	0.25
Insurance	2,519.7	-2.13	-2.13	0.37	-1.86	9.90	1.40	12.69	3.08	1.04
Consumer Discretionary	1,540.0	-1.71	-1.71	-1.80	-12.08	-3.99				
Energy	1,030.2	-1.19	-1.19	-3.62	-1.22	8.56	0.90	9.65	6.43	0.21
Technology	1,586.0	-2.24	-2.24	-6.84	-16.79	174.22	1.88	268.67		0.02
Utilities	421.1	0.63	0.63	0.63	-5.33	-7.51				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

U.S. crude oil on Friday booked a third straight weekly gain as fears of war between Israel and the Iran-backed militia Hezbollah grow. Brent August contract: \$86.41 per barrel, up 2 cents. Year to date, the global benchmark is ahead by 12.1%.

Kuwait Market

The market closed down by - 0.43% at 6,937.0 value traded 37.4 million KD, Premier market value reached 28.2 million KD down by - 0.43% at 7,543.6.

KSA Market

The market closed down by - 0.43% at 11,679.5

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	0.856	-0.70	-0.70	-0.12	-5.39	0.54	1.69	12.93	3.89	7.13
KFH	0.705	-0.70	-0.70	-3.42	-3.46	5.85	2.06	20.75	2.60	12.07
ZAIN	0.446	0.22	0.22	-0.45	-9.53	-12.03	1.55	10.13	7.85	1.93
BOUBYAN BANK	0.564	-0.35	-0.35	-2.59	-3.26	-0.36	2.37	30.10	1.34	2.37
AGILITY	0.279	1.45	1.45	-4.78	-23.33	-1.49	0.75	8.19	7.17	0.75
Saudi Arabia										
ARAMCO	27.90	0.72	0.72	-3.79	-9.56	-15.45	4.43	15.39	6.72	6,750.00
SABIC	73.80	0.41	0.41	-2.89	-5.75	-11.62	1.33	193.58	4.47	221.34
STC	38.10	1.60	1.60	5.83	-1.21	-3.17	2.36	14.14	4.20	190.45
AL-RAJHI BANK	80.00	-1.84	-1.84	5.12	-2.79	-7.51	2.96	19.94	2.88	319.91
NCB	36.25	-1.23	-1.23	7.09	-9.83	-6.21	1.20	11.19	4.83	217.44
Abu Dhabi										
ETISALAT.AD	16.10	1.00	1.51	0.00	-12.31	-18.02	3.21	13.40	4.97	140.00
FAB.AD	12.46	1.30	5.59	7.41	-5.75	-10.74	1.15	8.66	5.70	137.63
EMIRATES NBD	16.50	0.30	0.61	6.11	-5.71	-4.62	0.96	4.81	7.27	104.21
DB ISLAMIC DB	5.74	1.41	-0.35	3.99	-1.54	0.35	0.97	6.39	7.84	41.56
EMAR.DU	8.20	1.23	3.80	7.05	0.37	3.54	0.91	6.39	6.10	72.47
Qatar										
QNB	14.650	0.27	0.27	8.52	2.95	-11.37	1.30	9.25	4.44	135.31
INDUSTREIS QAT	12.880	0.63	0.63	11.52	7.78	-1.53	2.13	16.12	6.06	77.92
QA ISLAMIC BK	18.600	0.00	0.00	8.14	1.36	-13.49	1.54	10.63	3.90	43.95
MASRAF AL RAYA	2.329	-0.17	-0.17	1.13	0.39	-12.28	0.90	15.18	4.29	21.66
MESAEED PETRO	1.645	-0.06	-0.06	-4.36	-17.09	-8.00	1.28	20.50	5.23	20.67
Oman										
BANK MUSCAT	0.251	0.40	0.40	-3.09	-4.20	-4.92	0.82	9.79	6.18	1.88
OMANTEL	1.015	1.50	1.50	-3.97	-1.46	-4.25	1.24	11.46	5.91	0.76
BANK DHOFAR	0.165	0.00	0.00	5.10	3.13	3.13	0.69	16.37	4.70	0.49
NAT BANK OF OMAN	0.253	-0.78	-0.78	-9.64	-2.69	-9.64	0.61	8.86	3.36	0.41
OMINVEST	0.355	-1.39	-1.39	-7.79	-3.29	-10.19	0.75	7.71	5.63	0.24

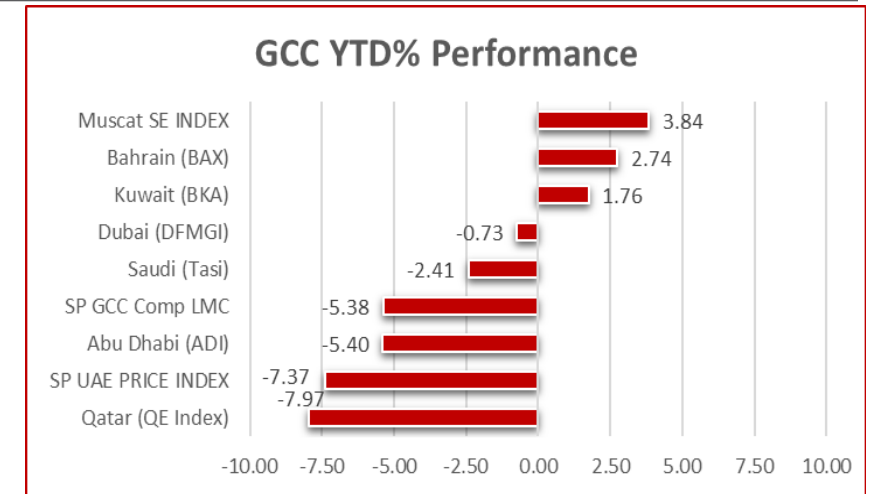
* GCC Markets performance at the latest close.

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 -0.43 %The leading sector bottom performance indices today are Technology -2.24 % Insurance -2.13 % Consumer Disc -1.71 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.72 %, SABIC have positive performance today by + 0.40%, STC has a positive performance today by + 1.6 %, Al Rajhi Bank have negative performance today by -1.84 %.



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