

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 1st October 2024





Monday, September 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)	12,226.1	-0.37	-1.20	0.67	4.68	2.16	3.09	23.51	3.36	10,102.00
Qatar (QE Index)	10,614.1	0.27	0.31	4.03	6.49	-2.00	1.24	12.02	4.24	535.36
Dubai (DFMGI)	4,503.5	-0.39	-0.39	4.12	11.75	10.93	1.59	8.86	5.30	683.35
Abu Dhabi (ADI)	9,425.5	-0.46	-0.46	1.51	4.03	-1.59	2.72	17.03	2.06	2,658.12
Bahrain (BAX)	2,012.8	-0.05	-0.05	2.82	-0.63	2.09	0.91	10.49	4.54	7.80
Muscat SE INDEX	4,710.3	-0.51	0.18	-0.76	0.49	4.35	0.83	9.96	5.82	7.30
SP GCC Comp LMC	185.6	-0.37	-1.05	1.27	6.06	0.36	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.0	-0.37	-0.37	3.04	11.19	2.99				

Developed Markets

MSCI World Index	3,723.0	-0.10	-0.10	1.69	6.02	17.48				
U.S. (S&P 500)	5,762.5	0.42	0.42	2.02	5.53	20.81	4.77	27.52	1.55	51,230.95
U.K. (FTSE 100)	8,237.0	-1.01	-1.01	-1.67	0.89	6.51	1.76	14.96	3.72	2,145.12
Japan (topix)	2,645.9	1.69	-1.83	1.69	1.69	13.71	1.38	14.39	2.19	932,637.21

Emerging Markets

MSCI EM Index	1,170.9	-0.31	-0.31	6.45	7.79	14.37				
China (SSE Composite)	3,336.5	8.06	8.06	17.39	12.44	12.15	1.36	12.00		44,025.04
India (Sensex)	84,299.8	-1.49	-1.49	2.35	6.66	16.69	4.51	24.44	1.08	167,531.39

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,136.3	-0.22	-0.84	-0.62	2.87	4.68	1.46	15.35	3.72	42.95
Kuwait Premier Index	7,708.7	-0.41	-1.04	-1.45	2.19	3.10	1.57	16.50	3.51	35.24
Kuwait Main Index	6,276.7	0.71	0.08	3.39	6.16	12.69	1.11	11.31	4.77	7.72
Kuwait Sector										
Banking	1,753.2	-0.49	-0.97	-1.44	2.40	6.41	1.74	17.35	3.12	26.25
Telecom	1,028.1	-0.32	-1.60	1.43	4.52	-6.97	1.51	12.41	8.18	3.14
Industrials	725.6	-0.43	-0.64	-4.63	-6.09	-20.08	0.77	11.25	5.95	2.45
Financial Services	1,410.6	-0.66	-0.96	0.87	7.58	16.37	1.16	12.61	2.92	4.72
Real Estate	1,375.6	0.13	-1.09	2.38	6.18	13.41	1.06	15.03	2.06	2.92
Basic Materials	807.3	-0.63	-0.45	-1.17	6.85	8.22	1.45	13.95	10.85	0.46
Health Care	470.7	-0.33	-0.33	6.63	6.58	-2.38	1.57	17.80	2.23	
Consumer Staples	1,003.8	0.41	0.52	1.21	21.77	52.42	2.18	20.70	2.05	0.30
Insurance	2,083.7	9.79	4.77	6.22	-17.30	-9.12	1.14	11.34	3.81	0.84
Consumer Discretionary	1,806.3	0.64	0.07	1.85	17.29	12.62				
Energy	1,117.6	1.92	0.17	1.68	8.48	17.76	0.95	9.50	5.67	0.23
Technology	1,447.7	2.05	-1.00	-9.55	-8.72	150.31	1.68	603.03		0.02
Utilities	389.5	-0.67	-1.99	-3.27	-7.50	-14.45				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were steady on Tuesday as the prospect of additional supply entering the market amid lackluster global demand growth offset concerns that the escalating Middle East conflict could disrupt exports in the key producing region. Brent crude futures for December delivery increased 13 cents, or 0.18%, to \$71.83 a barrel.

Kuwait Market

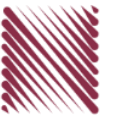
The market closed down by -0.22% at 7,136.3 value traded 104.2 million KD, Premier market value reached 42.2 million KD down by -0.41% at 7,708.7.

KSA Market

The market closed down by -0.37% at 12,226.1.

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	0.883	-0.11	-0.67	0.57	3.15	3.71	1.70	13.32	3.83	7.35
KFH	0.716	-0.56	-0.97	-1.51	1.56	7.50	2.09	20.18	2.68	12.25
ZAIN	0.475	0.00	-1.04	1.71	6.50	-6.31	1.81	11.21	7.37	2.04
BOUBYAN BANK	0.570	-0.70	-1.04	-3.06	1.06	0.70	2.38	29.27	1.32	2.39
AGILITY	0.219	-2.23	-4.37	-14.45	-21.51	-22.67	0.67	7.41	9.13	0.58
Saudi Arabia										
ARAMCO	27.10	-0.55	-1.81	-3.04	-2.87	-17.88	4.43	15.32	7.01	6,558.90
SABIC	74.90	0.81	0.00	0.13	1.49	-10.30	1.37	116.86	4.41	224.72
STC	43.70	-0.57	-0.91	1.63	14.70	11.06	2.88	16.01	3.66	218.52
AL-RAJHI BANK	87.20	-1.02	-2.68	-1.02	9.00	0.81	3.08	21.60	2.75	348.84
NCB	34.30	-2.00	-3.79	-2.00	-5.38	-11.25	1.18	10.90	5.25	205.82
Abu Dhabi										
ETISALAT.AD	18.50	-1.39	-1.39	1.98	14.91	-5.80	3.76	14.85	4.41	160.89
FAB.AD	13.74	-0.43	-0.43	2.54	10.27	-1.58	1.25	9.67	5.17	151.79
EMIRATES NBD	20.30	-2.17	-2.17	3.05	23.03	17.34	1.13	5.86	5.91	128.23
DB ISLAMIC DB	6.30	-0.94	-0.94	2.11	9.76	10.14	1.04	6.99	7.14	45.62
EMAR.DU	8.72	0.23	0.23	3.32	6.34	10.10	0.99	6.40	5.73	76.72
Qatar										
QNB	16.950	0.77	0.36	7.01	15.70	2.54	1.43	10.46	3.86	156.56
INDUSTREIS QAT	13.040	0.93	0.38	1.09	1.24	-0.31	2.09	15.08	5.37	78.65
QA ISLAMIC BK	21.350	1.72	2.99	9.26	14.78	-0.70	1.65	11.67	2.87	50.35
MASRAF AL RAYA	2.470	-0.40	0.24	7.39	6.05	-6.97	0.94	16.02	4.05	22.97
MESAIEED PETRO	1.630	-0.55	-1.39	-1.21	-0.91	-8.84	1.27	23.17	4.29	20.48
Oman										
BANK MUSCAT	0.252	-0.79	-1.95	-2.33	0.40	-4.55	0.82	9.79	6.15	1.90
OMANTEL	0.987	-0.10	0.71	-2.18	-2.76	-6.89	1.18	11.46	6.08	0.74
BANK DHOFAR	0.157	-4.85	0.00	-0.63	-4.85	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.290	0.00	0.00	7.41	14.62	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.352	0.57	0.00	6.67	-0.85	-10.95	0.78	8.49	5.68	0.24

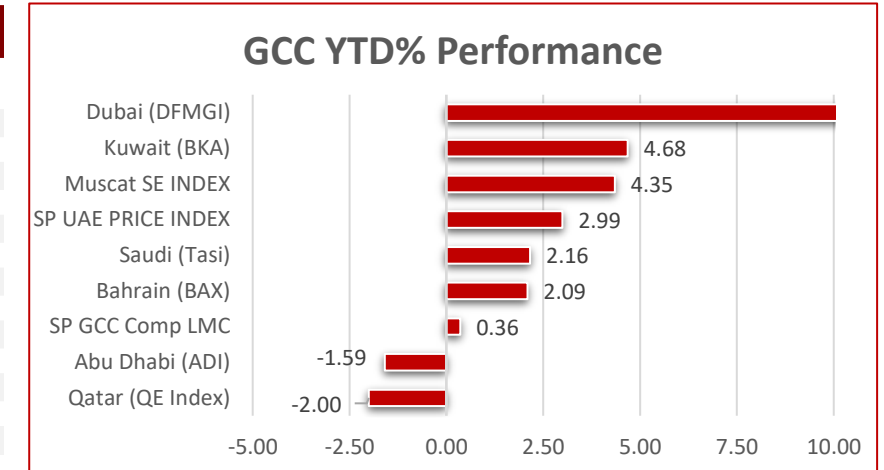
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Sept. 24	24.64%	15.35%	0.06%	3.65%	7.90%	17.58%	12.98%	5.93%	5.66%
25-Sept. 24	24.33%	15.45%	0.06%	3.67%	7.93%	17.59%	13.03%	5.98%	5.79%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.22 % The leading sector bottom performance indices today are Utilities -0.67 % Financial services -0.66 % Basic materials -0.63 % respectively

KSA

Saudi Armco have negative performance today by -0.55 %, SABIC have positive performance today by + 0.80%. STC have negative performance today by -0.57 %, Al Rajhi Bank have negative performance today by -1.02 %



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