

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

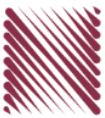
GCC DAILY MORNING BRIEF

Wednesday, 30th October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

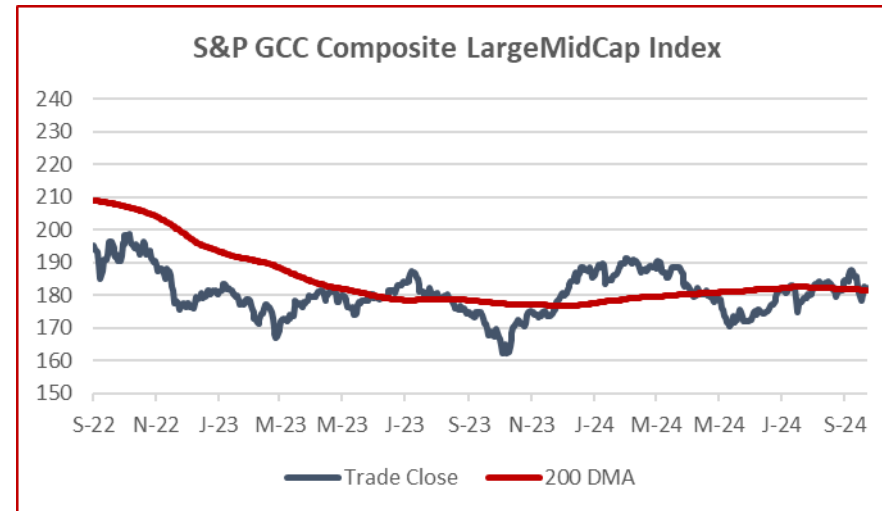


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,062.1	0.07	1.48	-1.34	-1.34	0.79	3.02	22.69	3.04	10,028.26
Qatar (QE Index)	10,590.5	0.82	1.83	-0.22	-0.22	-2.22	1.24	11.80	4.23	537.91
Dubai (DFMGI)	4,583.4	1.02	2.33	1.77	1.77	12.90	1.61	9.00	5.23	687.15
Abu Dhabi (ADI)	9,312.4	0.05	1.18	-1.20	-1.20	-2.77	2.70	16.76	2.06	2,625.80
Bahrain (BAX)	2,017.1	0.25	0.77	0.22	0.22	2.31	0.92	10.59	4.50	7.81
Muscat SE INDEX	4,766.3	-0.60	-1.23	1.19	1.19	5.59	0.85	10.05	5.78	7.40
SP GCC Comp LMC	183.9	0.29	1.81	-0.91	-0.91	-0.56	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.7	0.19	2.27	-0.90	-0.90	2.06				

Developed Markets										
MSCI World Index	3,717.9	0.03	0.33	-0.14	-0.14	17.31				
U.S. (S&P 500)	5,832.9	0.16	0.43	1.22	1.22	22.29	4.83	28.19	1.53	51,826.87
U.K. (FTSE 100)	8,219.6	-0.80	-0.35	-0.21	-0.21	6.29	1.72	15.38	3.72	2,134.03
Japan (topix)	2,682.0	0.91	2.43	1.36	1.36	13.34	1.40	14.60	2.18	944,676.62
Emerging Markets										
MSCI EM Index	1,136.5	-0.13	0.14	-2.94	-2.94	11.01				
China (SSE Composite)	3,286.4	-1.08	-0.40	-1.50	-1.50	10.47	1.36	12.00		44,025.04
India (Sensex)	80,369.0	0.45	1.22	-4.66	-4.66	11.25	4.29	23.02	1.14	158,274.55

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,110.8	0.19	1.85	-0.36	-0.36	4.31	1.45	15.05	3.97	42.74
Kuwait Premier Index	7,611.0	0.01	2.02	-1.27	-1.27	1.79	1.55	15.98	3.83	34.80
Kuwait Main Index	6,519.1	1.01	1.13	3.86	3.86	17.05	1.14	11.69	4.66	7.94
Kuwait Sector										
Banking	1,732.4	-0.06	1.55	-1.18	-1.18	5.16	1.72	16.79	3.16	25.96
Telecom	1,018.1	-0.30	2.68	-0.98	-0.98	-7.88	1.50	12.33	8.23	3.12
Industrials	689.5	0.10	2.78	-4.97	-4.97	-24.06	0.74	10.68	10.26	2.33
Financial Services	1,445.2	0.75	2.84	2.45	2.45	19.22	1.17	12.80	2.86	4.80
Real Estate	1,413.4	0.03	1.65	2.75	2.75	16.53	1.09	15.40	2.02	3.00
Basic Materials	848.6	2.91	4.32	5.12	5.12	13.76	1.48	12.51	10.62	0.47
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,031.3	0.17	0.64	2.73	2.73	56.59	2.23	21.23	2.00	0.31
Insurance	2,029.2	5.10	0.41	-2.62	-2.62	-11.50	1.05	10.49	4.11	0.78
Consumer Discretionary	1,962.0	0.82	1.98	8.62	8.62	22.33				
Energy	1,159.0	1.09	2.55	3.70	3.70	22.12	0.98	9.74	5.53	0.23
Technology	1,091.3	-1.32	-1.96	-24.62	-24.62	88.68	1.28	460.61		0.02
Utilities	379.0	0.00	0.00	-2.70	-2.70	-16.76				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices stabilized on Wednesday on industry data showing a surprise drop in U.S. crude and gasoline inventories, following two previous sessions of losses on the prospect of hostilities easing in the Middle East. Brent crude futures gained 21 cents, or 0.3%, to \$71.33 a barrel.

Kuwait Market

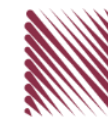
The market up by 0.19% at 7,110.8 value traded 74.1 million KD, Premier market value reached 37.2 million KD up by 0.01% at 7,611.0

KSA Market

The market closed up by 0.07% at 12,062.1.

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	0.850	-0.23	1.19	-3.74	-3.74	-0.17	1.60	12.54	3.98	7.08
KFH	0.714	-0.28	1.28	-0.28	-0.28	7.20	2.05	19.47	2.69	12.21
ZAIN	0.461	-0.22	3.36	-2.95	-2.95	-9.07	1.74	10.77	7.59	1.99
BOUBYAN BANK	0.549	0.92	2.81	-3.68	-3.68	-3.01	2.22	26.56	1.37	2.31
AGILITY	0.245	-0.41	5.15	11.87	11.87	-13.49	0.71	7.93	8.16	0.66
Saudi Arabia										
ARAMCO	27.00	0.00	-0.18	-0.37	-0.37	-18.18	4.33	14.98	7.04	6,531.04
SABIC	73.60	0.82	1.38	-1.74	-1.74	-11.86	1.35	114.83	4.48	220.70
STC	42.20	-0.71	0.24	-3.43	-3.43	7.25	2.75	15.32	3.79	210.90
AL-RAJHI BANK	88.20	1.38	3.89	1.15	1.15	1.97	3.03	21.27	2.72	352.64
NCB	33.80	-1.02	-1.60	-1.46	-1.46	-12.55	1.12	10.33	5.33	202.71
Abu Dhabi										
ETISALAT.AD	17.86	1.13	3.96	-3.46	-3.46	-9.06	3.54	14.01	4.56	155.32
FAB.AD	13.46	0.45	2.44	-2.04	-2.04	-3.58	1.15	9.21	5.27	148.70
EMIRATES NBD	19.00	-0.26	-0.52	-6.40	-6.40	9.83	0.97	5.33	6.32	120.02
DB ISLAMIC DB	6.27	0.97	2.79	-0.48	-0.48	9.62	1.02	6.87	7.18	45.40
EMAR.DU	8.88	0.45	4.10	1.83	1.83	12.12	1.02	6.53	5.63	78.49
Qatar										
QNB	17.390	1.05	1.10	2.60	2.60	5.20	1.44	10.57	3.77	160.62
INDUSTREIS QAT	13.540	0.67	1.12	3.83	3.83	3.52	2.18	14.61	5.17	81.92
QA ISLAMIC BK	20.920	1.80	3.05	-2.01	-2.01	-2.70	1.63	11.51	2.93	49.43
MASRAF AL RAYA	2.385	-0.13	1.79	-3.44	-3.44	-10.17	0.89	15.23	4.19	22.18
MESAIEED PETRO	1.590	-0.62	0.32	-2.45	-2.45	-11.07	1.23	24.95	4.40	19.98
Oman										
BANK MUSCAT	0.259	0.00	-1.89	2.78	2.78	-1.89	0.83	9.86	5.98	1.94
OMANTEL	0.989	-0.20	-0.70	0.20	0.20	-6.70	1.19	11.57	6.07	0.74
BANK DHOFAR	0.177	0.57	0.57	12.74	12.74	10.63	0.72	19.84	4.38	0.53
NAT BANK OF OMAN	0.300	0.00	0.00	3.45	3.45	7.14	0.71	10.41	2.83	0.49
OMINVEST	0.372	0.00	-0.53	5.68	5.68	-5.89	0.82	8.97	5.38	0.25

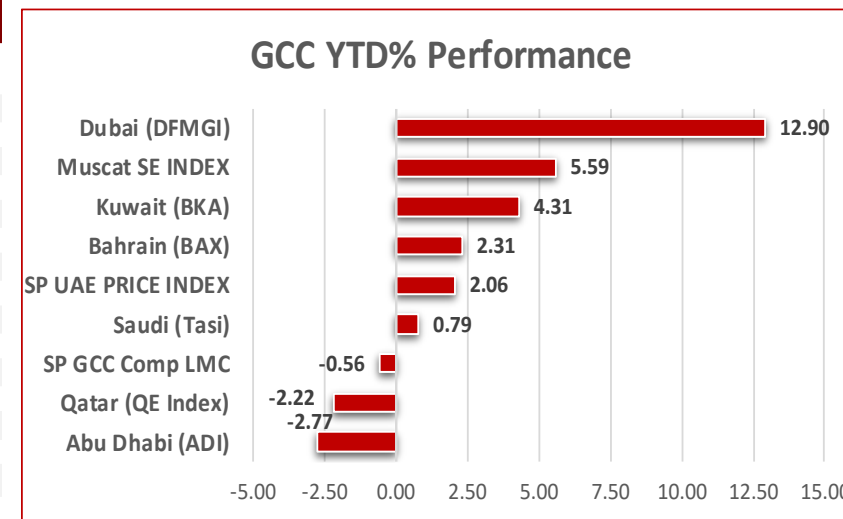
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
16-October. 24	24.73%	15.75%	0.06%	3.72%	7.91%	17.62%	12.98%	6.18%	5.85%
23-October. 24	24.71%	15.85%	0.06%	3.71%	7.76%	17.64%	13.00%	6.16%	5.87%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.19 %The leading sector best performance indices today are Insurance 5.1 % Basic materials 2.91 % Energy 1.09% respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.82%, STC have negative performance today by -0.71 %, Al Rajhi Bank has a positive performance today by + 1.38 %.



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