

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

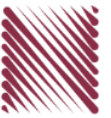
GCC DAILY MORNING BRIEF

Thursday, 31st October 2024



DAILY MARKETS WRAP,

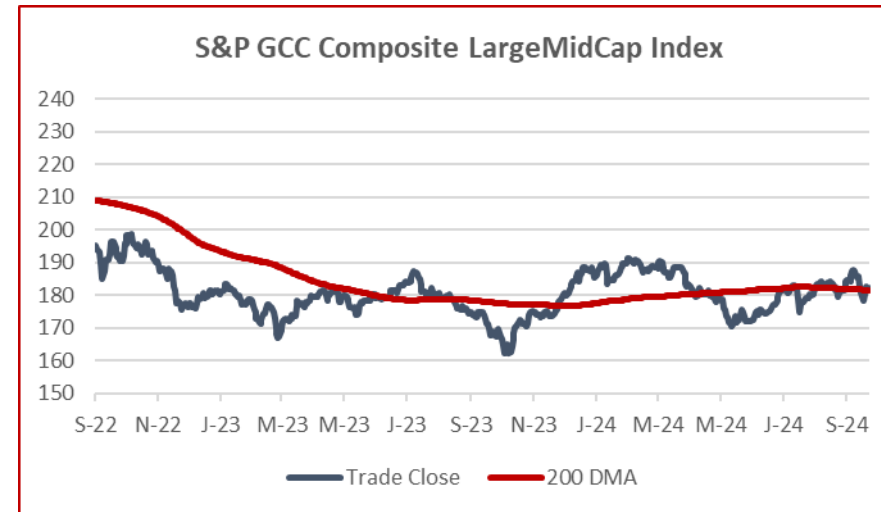
NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,018.81	-0.36	1.12	-1.70	-1.70	0.43	10,030 SAR	2.04	17.64
Qatar (QE Index)	10,463.68	-1.20	0.61	-1.42	-1.42	-3.39	548 QAR	1.20	13.12
Dubai (DFMGI)	4,604.52	0.46	3.15	2.24	2.24	13.42	689 AED	1.50	9.38
Abu Dhabi (ADI)	9,327.54	0.16	1.43	-1.04	-1.04	-2.61	1,435 AED	1.82	14.81
Bahrain (BAX)	2,018.21	0.05	0.82	0.27	0.27	2.37	10 BHD	1.54	12.47
MUSCAT SE INDEX	4,756.29	-0.21	-1.44	0.98	0.98	5.37	5 OMR	0.99	12.01
SP GCC Comp LMC	183.38	-0.29	1.56	-1.20	-1.20	-0.85			
SP UAE PRICE INDEX	141.00	0.23	2.75	-0.68	-0.68	2.30			
Developed Markets									
MSCI World Index	3,706.29	-0.31	-0.02	-0.45	-0.45	16.95			
U.S. (S&P 500)	5,813.67	-0.33	0.07	0.89	0.89	21.88			
U.K. (FTSE 100)	8,159.63	-0.73	-1.33	-0.94	-0.94	5.51			
Japan (Topix)	2,703.72	0.81	2.59	2.18	2.18	14.26			
Emerging Markets									
MSCI EM Index	1,126.51	-0.88	-0.71	-3.79	-3.79	10.04			
China (SSE Composite)	3,266.24	-0.61	-0.43	-2.11	-2.11	9.79			
India (Sensex)	79,942.18	-0.53	-0.15	-5.17	-5.17	10.66			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,113.40	0.04	1.89	-0.32	-0.32	4.34	42.69 KWD	1.86	18.17
Kuwait Premier Index	7,617.39	0.084	2.10	-1.18	-1.18	1.88	31.90 KWD	1.82	17.51
Kuwait Main Index	6,507.74	-0.17	0.96	3.68	3.68	16.84	10.78 KWD	1.97	20.19
Kuwait Sector									
Banking	1,736.30	0.22	1.77	-0.96	-0.96	5.39	26.01 KWD	1.45	18.51
Telecom	1,013.57	-0.44	2.22	-1.41	-1.41	-8.29	3.10 KWD	1.35	13.54
Industrials	689.60	0.02	2.80	-4.96	-4.96	-24.04	2.33 KWD	0.86	16.38
Financial services	1,442.91	-0.16	2.68	2.29	2.29	19.03	4.19 KWD	0.94	17.16
Real estate	1,400.31	-0.93	0.71	1.79	1.79	15.45	2.98 KWD	0.79	22.09
Basic materials	841.15	-0.88	3.41	4.20	4.20	12.77	0.76 KWD	2.24	9.09
Health care	470.69	0.00	0.00	0.00	0.00	-2.38	0.23 KWD	1.53	47.58
Consumer services	1,023.40	-0.76	-0.13	1.95	1.95	55.39	1.06 KWD	1.40	27.25
Insurance	2,038.72	0.47	0.88	-2.16	-2.16	-11.08	0.80 KWD	1.18	8.73
Consumer Disc	1,971.31	0.47	2.47	9.14	9.14	22.91	0.31 KWD	1.65	28.26
Energy	1,133.52	-2.19	0.30	1.43	1.43	19.44	0.24 KWD	1.02	4.48
Technology	1,083.97	-0.67	-2.61	-25.13	-25.13	87.42	0.01 KWD	1.26	451.52
Utilities	397.37	4.86	4.86	2.03	2.03	-12.72	0.17 KWD	1.26	15.53

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday, extending the previous day's rally, driven by optimism over U.S. fuel demand following an unexpected drop in crude and gasoline inventories, while reports that OPEC+ may delay a planned output increase offered support. Brent crude futures gained 35 cents, or 0.5%, to \$72.90 a barrel.

Kuwait Market

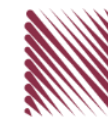
The market up by 0.04% at 7,113.4 value traded 93.7 million KD, Premier market value reached 46.9 million KD up by 0.08% at 7,617.4

KSA Market

The market closed down by 0.36% at 12,018.8.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.850	0.00	1.19	-3.74	-3.74	-0.17	7.08 KWD	1.60	27.00
KFH	0.717	0.42	1.70	0.14	0.14	7.65	12.27 KWD	2.06	32.00
Zain	0.458	-0.65	2.69	-3.58	-3.58	-9.66	1.98 KWD	1.73	10.70
BOUBYAN BANK	0.554	0.91	3.75	-2.81	-2.81	-2.13	2.33 KWD	2.24	34.00
Agility	0.243	-0.82	4.29	10.96	10.96	-14.20	0.65 KWD	0.71	7.86
Saudi Arabia									
ARAMCO	27.05	0.19	0.00	-0.18	-0.18	-18.03	6,550.11 SAR	4.34	14.98
SABIC	72.90	-0.95	0.41	-2.67	-2.67	-12.69	218.83 SAR	1.33	35.00
STC	42.45	0.59	0.83	-2.86	-2.86	7.89	212.38 SAR	2.77	15.30
AL-RAJHI BANK	88.30	0.11	4.00	1.26	1.26	2.08	353.42 SAR	3.03	20.15
NCB	33.65	-0.44	-2.04	-1.90	-1.90	-12.94	202.02 SAR	1.12	10.12
United Arab Emirates									
ETISALAT.AD	17.86	0.00	4.94	-3.46	-3.46	-9.06	206.60 AED	5.10	21.10
FAB.AD	13.30	-1.19	1.37	-3.20	-3.20	-4.73	146.94 AED	1.14	9.10
EMIRATES NBD	19.00	0.00	-0.26	-6.40	-6.40	9.83	120.02 AED	0.97	5.33
DB ISLAMIC BK	6.29	0.32	2.78	-0.16	-0.16	9.97	45.55 AED	1.03	6.89
EMAAR PROPERT	8.75	-1.46	3.18	0.34	0.34	10.48	77.34 AED	1.00	6.43
Qatar									
QNB	17.21	-1.04	0.06	1.53	1.53	4.11	158.96 QAR	1.42	10.46
INDUSTRIES QAT	13.31	-1.70	-0.60	2.07	2.07	1.76	80.53 QAR	2.18	16.28
QA ISLAMIC BK	20.50	-2.01	0.99	-3.98	-3.98	-4.65	48.44 QAR	1.60	11.27
MASRAF AL RAYA	2.39	0.17	1.96	-3.28	-3.28	-10.02	22.22 QAR	0.89	15.26
MESAIEED PETRO	1.57	-1.38	-1.07	-3.80	-3.80	-12.30	19.70 QAR	1.21	24.62
OMAN									
BANK MUSCAT	0.258	-0.39	-2.27	2.38	2.38	-2.27	1.94 OMR	0.80	8.33
OMANTEL	0.989	11.37	-0.70	0.20	0.20	-6.70	0.74 OMR	1.19	7.69
BANK DHOFAR	0.177	0.00	0.57	12.74	12.74	10.63	0.53 QAR	0.72	14.93
NAT BANK OF OMAN	0.300	0.00	0.00	3.45	3.45	7.14	0.49 QAR	0.71	12.71
OMINVEST	0.368	-1.08	-1.60	4.55	4.55	-6.90	0.25 QAR	0.81	6.85

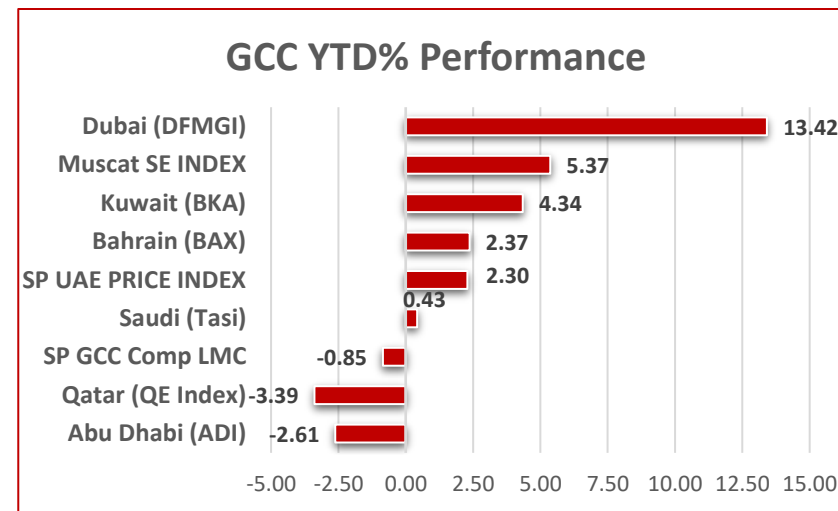
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
23-October. 24	24.71%	15.85%	0.06%	3.71%	7.76%	17.64%	13.00%	6.16%	5.87%
30-October. 24	24.69%	15.88%	0.06%	3.69%	7.80%	17.65%	13.08%	6.14%	5.91%

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 + 0.04 %The leading sector best performance indices today are Utilities 4.86 % Consumer Disc 0.47 % Insurance 0.47 % respectively

KSA

Saudi Armco has a positive performance today by + 0.19 %, SABIC have negative performance today by -0.95%, STC has a positive performance today by + 0.59 %, Al Rajhi Bank has a positive performance today by + 0.11 %.



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