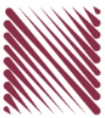


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 3rd September 2024





Tuesday, September 3, 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)	12,180.4	0.11	0.29	0.29	4.29	1.78	3.09	23.54	3.34	10,231.69
Qatar (QE Index)	10,383.4	0.38	1.77	1.77	4.17	-4.13	1.21	11.71	4.32	524.68
Dubai (DFMGI)	4,369.8	0.30	1.03	1.03	8.43	7.64	1.54	8.57	5.50	659.01
Abu Dhabi (ADI)	9,379.1	0.17	1.01	1.01	3.51	-2.08	2.71	13.40	2.06	2,587.31
Bahrain (BAX)	1,948.2	-0.03	-0.47	-0.47	-3.81	-1.18	0.87	9.97	4.75	7.53
Muscat SE INDEX	4,777.9	0.13	0.66	0.66	1.93	5.84	0.85	10.16	5.71	7.45
SP GCC Comp LMC	184.2	0.23	0.50	0.50	5.26	-0.40	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.5	0.49	1.24	1.24	9.25	1.19				
Developed Markets										
MSCI World Index	3,595.4	-1.75	-1.80	-1.80	2.38	13.45				
U.S. (S&P 500)	5,528.9	-2.12	-2.12	-2.12	1.25	15.91	4.68	26.82	1.56	49,974.75
U.K. (FTSE 100)	8,298.5	-0.78	-0.93	-0.93	1.65	7.31	1.77	15.13	3.68	2,159.29
Japan (topix)	2,733.3	0.64	0.76	0.76	-2.72	15.50	1.43	14.88	2.12	963,096.27
Emerging Markets										
MSCI EM Index	1,090.2	-0.56	-0.89	-0.89	0.36	6.49				
China (SSE Composite)	2,803.0	-0.29	-1.38	-1.38	-5.54	-5.78	1.36	12.00		44,025.04
India (Sensex)	82,555.4	-0.01	0.23	0.23	4.46	14.28	4.41	23.95	1.11	164,603.29
Kuwait										
Kuwait All Share Index	7,189.0	0.28	0.11	0.11	3.63	5.45	1.47	15.42	3.70	43.15
Kuwait Premier Index	7,827.8	0.31	0.07	0.07	3.77	4.69	1.59	16.70	3.47	35.67
Kuwait Main Index	6,088.8	0.10	0.30	0.30	2.98	9.32	1.07	10.92	4.88	7.48
Kuwait Sector										
Banking	1,770.1	0.18	-0.49	-0.49	3.39	7.45	1.75	17.49	3.10	26.46
Telecom	1,035.2	0.81	2.12	2.12	5.23	-6.33	1.50	12.39	8.19	3.14
Industrials	767.7	0.62	0.90	0.90	-0.64	-15.45	0.81	11.86	5.66	2.58
Financial Services	1,411.1	0.50	0.91	0.91	7.62	16.41	1.15	12.53	2.92	4.70
Real Estate	1,347.6	0.41	0.29	0.29	4.01	11.10	1.03	14.60	2.10	2.84
Basic Materials	810.2	-0.64	-0.81	-0.81	7.24	8.61	1.47	14.09	10.74	0.46
Health Care	473.1	0.36	7.18	7.18	7.13	-1.88	1.58	17.83	2.22	
Consumer Staples	1,030.2	2.07	3.87	3.87	24.97	56.43	2.19	20.81	2.04	0.31
Insurance	1,982.6	-0.89	1.06	1.06	-21.32	-13.53	1.09	10.92	3.97	0.81
Consumer Discretionary	1,780.6	-0.26	0.40	0.40	15.63	11.02				
Energy	1,100.7	1.15	0.15	0.15	6.84	15.98	0.93	9.38	5.82	0.22
Technology	1,600.5	0.00	0.00	0.00	0.92	176.73	1.86	666.67		0.02
Utilities	402.6	0.00	0.00	0.00	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended declines during Asia trading hours, after a report that Libya's oil production was set to be restored pressured prices overnight. OPEC+ plans to raise output amid weakness in China's economy have also been dragging prices lower. Global benchmark Brent slipped 0.57% to \$73.33 a barrel.

Kuwait Market

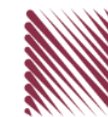
The market closed up by +0.28% at 7,189.0 value traded 70.8 million KD, Premier market value reached 43.0 million KD up by +0.31% at 7,827.8.

KSA Market

The market closed up by +0.11% at 12,180.4.

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	0.875	0.23	-0.34	-0.34	2.22	2.77	1.67	13.11	3.86	7.29
KFH	0.725	0.14	-0.28	-0.28	2.84	8.85	2.09	20.23	2.64	12.40
ZAIN	0.482	1.05	3.21	3.21	8.07	-4.93	1.82	11.26	7.26	2.09
BOUBYAN BANK	0.589	0.17	0.17	0.17	4.43	4.06	2.43	29.93	1.28	2.47
AGILITY	0.256	1.19	0.00	0.00	-8.24	-9.61	0.75	8.28	7.81	0.69
Saudi Arabia										
ARAMCO	27.90	0.00	-0.18	-0.18	0.00	-15.45	4.47	15.48	6.81	6,752.52
SABIC	75.70	0.26	1.20	1.20	2.57	-9.34	1.39	118.11	4.36	227.12
STC	43.25	-0.12	0.58	0.58	13.52	9.92	2.82	15.71	3.70	216.27
AL-RAJHI BANK	88.50	1.14	0.45	0.45	10.63	2.31	3.04	21.34	2.71	354.04
NCB	34.95	0.00	-0.14	-0.14	-3.59	-9.57	1.16	10.69	5.15	209.72
Abu Dhabi										
ETISALAT.AD	18.20	0.89	0.33	0.33	13.04	-7.33	3.61	14.27	4.48	158.28
FAB.AD	13.36	-0.60	-0.30	-0.30	7.22	-4.30	1.20	9.26	5.31	147.59
EMIRATES NBD	20.30	1.50	3.05	3.05	23.03	17.34	1.10	5.70	5.91	128.22
DB ISLAMIC DB	6.18	-0.32	0.16	0.16	7.67	8.04	1.01	6.77	7.28	44.75
EMAR.DU	8.85	1.61	4.86	4.86	7.93	11.74	1.01	6.51	5.65	78.22
Qatar										
QNB	15.920	-0.50	0.51	0.51	8.67	-3.69	1.35	9.86	4.11	147.04
INDUSTREIS QAT	13.100	0.31	1.55	1.55	1.71	0.15	2.11	15.20	5.34	79.26
QA ISLAMIC BK	20.160	0.50	3.17	3.17	8.39	-6.23	1.60	11.35	3.04	47.64
MASRAF AL RAYA	2.375	0.59	3.26	3.26	1.98	-10.55	0.90	15.45	4.21	22.09
MESAEED PETRO	1.688	0.54	2.30	2.30	2.61	-5.59	1.29	23.66	4.15	21.21
Oman										
BANK MUSCAT	0.262	-0.38	1.55	1.55	4.38	-0.76	0.83	9.98	5.92	1.97
OMANTEL	1.009	-0.88	0.00	0.00	-0.59	-4.81	1.22	11.80	5.95	0.76
BANK DHOFAR	0.158	0.00	0.00	0.00	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.270	0.00	0.00	0.00	6.72	-3.57	0.64	9.37	3.15	0.44
OMINVEST	0.348	1.75	5.45	5.45	-1.97	-11.96	0.77	8.39	5.75	0.23

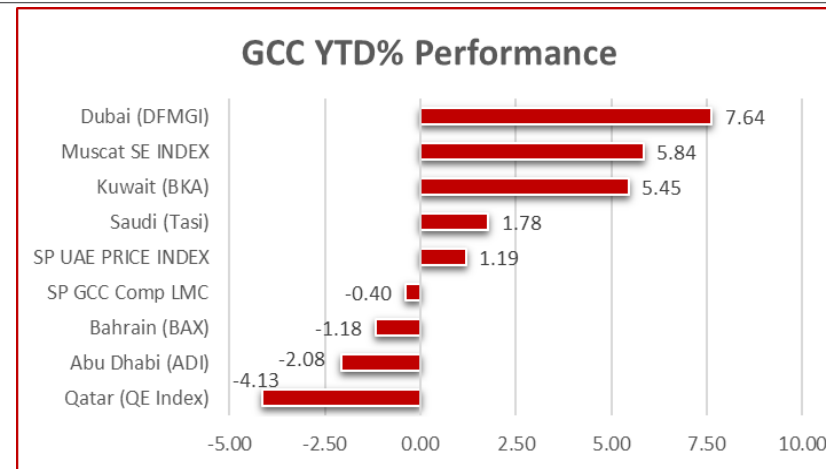
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
21-August 24	24.57%	14.80%	0.06%	3.30%	7.67%	17.58%	12.97%	5.97%	5.74%
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%

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 up today by + 0.28 %The leading sector best performance indices today are Consumer services 2.07 % Energy 1.15 % Telecom 0.81% respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.26%, STC have negative performance today by -0.12 %, Al Rajhi Bank has a positive performance today by + 1.14 %.



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