

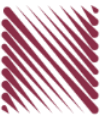


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 3rd October 2024



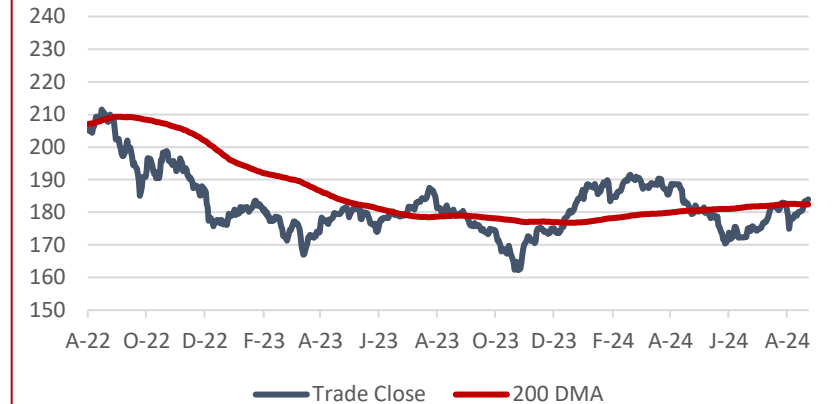


Wednesday, October 2, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,044.1	-1.71	-2.67	-1.49	-1.49	0.64	3.01	22.89	3.42	10,065.73
Qatar (QE Index)	10,566.4	-0.60	-0.14	-0.45	-0.45	-2.44	1.23	11.97	4.25	533.55
Dubai (DFMGI)	4,440.3	-0.83	-1.79	-1.40	-1.40	9.37	1.57	8.74	5.37	672.56
Abu Dhabi (ADI)	9,307.1	-1.05	-1.72	-1.26	-1.26	-2.83	2.69	16.86	2.06	2,587.67
Bahrain (BAX)	2,008.3	-0.01	-0.28	-0.22	-0.22	1.87	0.91	10.46	4.55	7.78
Muscat SE INDEX	4,677.5	-0.40	-0.52	-0.70	-0.70	3.62	0.83	9.92	5.85	7.26
SP GCC Comp LMC	182.8	-1.62	-2.56	-1.53	-1.53	-1.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.3	-1.48	-2.21	-1.85	-1.85	1.09				
Developed Markets										
MSCI World Index	3,685.9	-0.21	-1.10	-1.00	-1.00	16.31				
U.S. (S&P 500)	5,709.5	0.01	-0.50	-0.92	-0.92	19.70	4.73	27.32	1.56	50,795.10
U.K. (FTSE 100)	8,290.9	0.17	-0.36	0.65	0.65	7.21	1.76	15.07	3.70	2,156.93
Japan (topix)	2,652.0	-1.44	-3.25	0.23	0.23	12.07	1.38	14.43	2.19	933,673.25
Emerging Markets										
MSCI EM Index	1,188.0	1.31	1.14	1.46	1.46	16.04				
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)	84,266.3	-0.04	-1.53	-0.04	-0.04	16.65	4.50	24.43	1.08	167,424.56
Kuwait										
Kuwait All Share Index	7,070.5	-1.20	-1.76	-0.92	-0.92	3.71	1.47	15.39	3.71	43.07
Kuwait Premier Index	7,630.4	-1.22	-2.05	-1.02	-1.02	2.05	1.58	16.53	3.50	35.31
Kuwait Main Index	6,246.4	-1.13	-0.41	-0.48	-0.48	12.15	1.11	11.38	4.76	7.76
Kuwait Sector										
Banking	1,733.6	-1.23	-2.07	-1.12	-1.12	5.22	1.74	17.37	3.12	26.28
Telecom	1,016.9	-1.27	-2.68	-1.09	-1.09	-7.99	1.51	12.43	8.16	3.15
Industrials	721.1	-0.93	-1.25	-0.62	-0.62	-20.57	0.78	11.28	5.93	2.46
Financial Services	1,394.9	-1.71	-2.07	-1.11	-1.11	15.07	1.16	12.69	2.90	4.74
Real Estate	1,379.4	-0.79	-0.82	0.27	0.27	13.72	1.07	15.21	2.05	2.95
Basic Materials	799.7	-1.06	-1.38	-0.94	-0.94	7.21	1.45	13.96	10.84	0.46
Health Care	470.7	0.00	-0.33	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,005.9	-1.51	0.72	0.21	0.21	52.74	2.22	21.06	2.01	0.31
Insurance	2,071.8	-0.50	4.17	-0.57	-0.57	-9.64	1.13	11.31	3.81	0.84
Consumer Discretionary	1,800.2	-0.89	-0.27	-0.34	-0.34	12.24				
Energy	1,133.3	-2.02	1.58	1.41	1.41	19.42	0.99	9.84	5.48	0.24
Technology	1,447.7	0.00	-1.00	0.00	0.00	150.31	1.68	603.03		0.02
Utilities	392.1	0.68	-1.32	0.68	0.68	-13.87				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices ticked higher in early trade on Thursday as investors weighed the escalating conflict in the Middle East and the potential for disruption to crude flows, against an amply-supplied global market. Brent crude futures increased 64 cents, or 0.87%, to \$74.54 a barrel.

Kuwait Market

The market down by -1.2% at 7,070.5 value traded 76.5 million KD, Premier market value reached 37.1 million KD down by -1.22% at 7,630.4.

KSA Market

The market closed down by -1.71% at 12,044.1.

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	0.867	-1.59	-2.47	-1.81	-1.81	1.83	1.66	12.99	3.90	7.23
KFH	0.711	-0.97	-1.66	-0.70	-0.70	6.75	2.05	19.84	2.70	12.18
ZAIN	0.468	-1.27	-2.50	-1.47	-1.47	-7.69	1.76	10.93	7.48	2.03
BOUBYAN BANK	0.566	-0.88	-1.74	-0.70	-0.70	-0.01	2.33	28.76	1.33	2.38
AGILITY	0.217	-1.36	-5.24	-0.91	-0.91	-23.38	0.63	7.02	9.22	0.58
Saudi Arabia										
ARAMCO	27.20	0.00	-1.45	0.37	0.37	-17.58	4.36	15.10	6.98	6,581.17
SABIC	74.90	-1.58	0.00	0.00	0.00	-10.30	1.37	116.86	4.41	224.66
STC	43.10	-1.71	-2.27	-1.37	-1.37	9.54	2.81	15.65	3.71	215.46
AL-RAJHI BANK	84.90	-2.86	-5.25	-2.64	-2.64	-1.85	2.92	20.47	2.83	339.54
NCB	33.80	-2.31	-5.19	-1.46	-1.46	-12.55	1.12	10.33	5.33	202.76
Abu Dhabi										
ETISALAT.AD	18.40	-0.22	-1.92	-0.54	-0.54	-6.31	3.65	14.43	4.43	160.02
FAB.AD	13.40	-2.76	-2.90	-2.47	-2.47	-4.01	1.20	9.29	5.30	148.04
EMIRATES NBD	20.00	-0.99	-3.61	-1.48	-1.48	15.61	1.09	5.61	6.00	126.33
DB ISLAMIC DB	6.20	-2.05	-2.52	-1.59	-1.59	8.39	1.01	6.80	7.26	44.89
EMAR.DU	8.46	-1.74	-2.76	-2.98	-2.98	6.82	0.97	6.22	5.91	74.78
Qatar										
QNB	16.900	-0.59	0.06	-0.29	-0.29	2.24	1.43	10.46	3.88	156.10
INDUSTREIS QAT	13.080	0.46	0.69	0.31	0.31	0.00	2.11	15.18	5.35	79.13
QA ISLAMIC BK	21.100	-0.71	1.78	-1.17	-1.17	-1.86	1.68	11.88	2.90	49.86
MASRAF AL RAYA	2.459	-0.77	-0.20	-0.45	-0.45	-7.38	0.94	15.99	4.07	22.87
MESAIEED PETRO	1.631	-0.18	-1.33	0.06	0.06	-8.78	1.25	22.87	4.29	20.49
Oman										
BANK MUSCAT	0.252	0.00	-1.95	0.00	0.00	-4.55	0.80	9.60	6.15	1.89
OMANTEL	0.981	-0.41	0.10	-0.61	-0.61	-7.45	1.19	11.47	6.12	0.74
BANK DHOFAR	0.157	0.00	0.00	0.00	0.00	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.290	0.00	0.00	0.00	0.00	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.350	-0.57	-0.57	-0.57	-0.57	-11.46	0.77	8.44	5.71	0.23

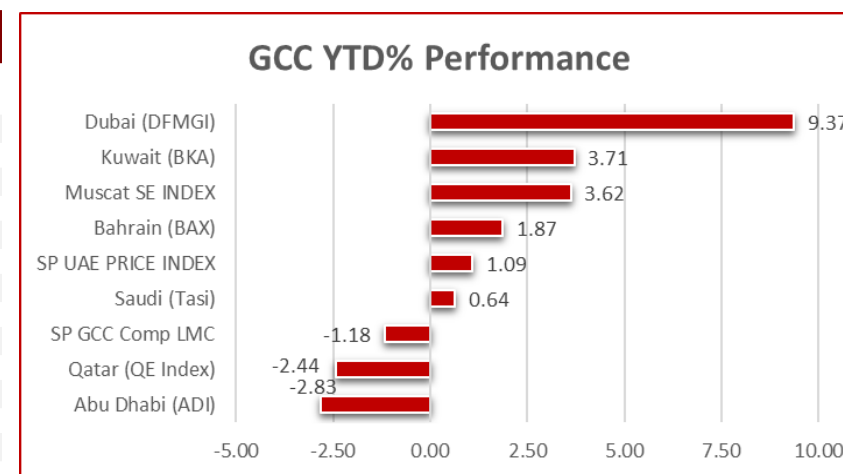
* GCC Markets performance at the latest close.

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 -1.2 %The leading sector bottom performance indices today are Energy -2.02 % Financial services -1.71 % Consumer services -1.51 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -1.57%, STC have negative performance today by -1.71 %, Al Rajhi Bank have negative performance today by -2.86 %.



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