



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday ,4<sup>th</sup> August 2024





Sunday, August 4, 2024

| * Market Watch           | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |        |      |        |                |                       |
| Saudi (Tasi)             | 11,754.4    | -2.42 | -2.42 | -2.93 | 0.64  | -1.78  | 2.87 | 22.63  | 3.27           | 9,913.91              |
| Qatar (QE Index)         | 10,057.1    | -0.73 | -0.73 | -0.95 | 0.90  | -7.14  | 1.17 | 11.34  | 4.62           | 507.61                |
| Dubai (DFMGI)            | 4,237.3     | -1.00 | -1.01 | -0.72 | 5.14  | 4.37   | 1.48 | 8.46   | 5.71           | 637.77                |
| Abu Dhabi (ADI)          | 9,292.2     | -0.79 | -0.27 | -0.50 | 2.55  | -2.98  | 2.68 | 16.49  | 2.07           | 2,571.13              |
| Bahrain (BAX)            | 1,951.3     | -1.00 | -1.00 | -0.94 | -3.66 | -1.02  | 0.87 | 11.03  | 4.63           | 7.54                  |
| Muscat SE INDEX          | 4,647.2     | -0.43 | -0.43 | -0.31 | -0.85 | 2.95   | 0.82 | 9.82   | 5.88           | 7.22                  |
| SP GCC Comp LMC          | 178.8       | -1.77 | -1.77 | -2.27 | 2.16  | -3.33  | 1.74 | 14.31  | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 134.6       | 0.00  | 0.00  | -0.66 | 5.42  | -2.35  |      |        |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |        |      |        |                |                       |
| MSCI World Index         | 3,448.8     | -1.97 | -2.14 | -3.44 | -1.79 | 8.82   |      |        |                |                       |
| U.S. (S&P 500)           | 5,346.6     | -1.84 | -2.06 | -3.18 | -2.09 | 12.09  | 4.42 | 25.57  | 1.65           | 47,273.92             |
| U.K. (FTSE 100)          | 8,174.7     | -1.31 | -1.34 | -2.31 | 0.13  | 5.71   | 1.73 | 14.86  | 3.75           | 2,128.98              |
| Japan (topix)            | 2,537.6     | -6.14 | -6.00 | -9.19 | -9.68 | 7.24   | 1.33 | 14.03  | 2.28           | 894,517.84            |
| <b>Emerging Markets</b>  |             |       |       |       |       |        |      |        |                |                       |
| MSCI EM Index            | 1,061.2     | -2.44 | -1.03 | -2.17 | -2.30 | 3.66   |      |        |                |                       |
| China (SSE Composite)    | 2,905.3     | -0.92 | 0.50  | -1.14 | -2.09 | -2.34  | 1.36 | 12.00  |                | 44,025.04             |
| India (Sensex)           | 80,982.0    | -1.08 | -0.43 | -0.93 | 2.47  | 12.10  | 4.51 | 23.71  | 1.13           | 160,737.94            |
|                          |             |       |       |       |       |        |      |        |                |                       |
| Description              | Close Price | DTD   | WTD   | MTD   | QTD   | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |       |       |       |        |      |        |                |                       |
| Kuwait All Share Index   | 7,070.7     | -1.99 | -1.99 | -2.33 | 1.93  | 3.72   | 1.48 | 15.40  | 3.60           | 43.44                 |
| Kuwait Premier Index     | 7,695.3     | -2.16 | -2.16 | -2.58 | 2.01  | 2.92   | 1.60 | 16.79  | 3.42           | 35.96                 |
| Kuwait Main Index        | 6,002.4     | -1.14 | -1.14 | -1.09 | 1.52  | 7.77   | 1.07 | 10.62  | 4.46           | 7.48                  |
| <b>Kuwait Sector</b>     |             |       |       |       |       |        |      |        |                |                       |
| Banking                  | 1,757.6     | -2.17 | -2.17 | -2.59 | 2.66  | 6.68   | 1.78 | 17.76  | 3.02           | 26.90                 |
| Telecom                  | 971.8       | -1.68 | -1.68 | -2.07 | -1.21 | -12.07 | 1.45 | 11.68  | 8.50           | 3.02                  |
| Industrials              | 768.6       | -2.00 | -2.00 | -2.08 | -0.52 | -15.34 | 0.84 | 11.66  | 5.51           | 2.65                  |
| Financial Services       | 1,336.0     | -2.03 | -2.03 | -2.09 | 1.89  | 10.21  | 1.11 | 12.22  | 2.92           | 4.57                  |
| Real Estate              | 1,314.0     | -1.15 | -1.15 | -1.45 | 1.42  | 8.34   | 1.02 | 14.30  | 2.05           | 2.83                  |
| Basic Materials          | 740.3       | -1.69 | -1.69 | -1.29 | -2.01 | -0.75  | 1.35 | 13.21  | 11.63          | 0.42                  |
| Health Care              | 468.0       | 0.00  | 0.00  | 0.00  | 5.97  | -2.93  | 1.56 | 14.30  | 2.24           |                       |
| Consumer Staples         | 941.5       | -2.73 | -2.73 | -4.19 | 14.20 | 42.96  | 2.10 | 21.48  | 2.12           | 0.29                  |
| Insurance                | 2,356.2     | -0.49 | -0.49 | -0.74 | -6.49 | 2.77   | 1.29 | 11.64  | 3.35           | 0.96                  |
| Consumer Discretionary   | 1,652.4     | -2.20 | -2.20 | -2.43 | 7.30  | 3.02   |      |        |                |                       |
| Energy                   | 1,054.1     | -0.77 | -0.77 | -1.77 | 2.32  | 11.07  | 0.91 | 9.87   | 6.30           | 0.22                  |
| Technology               | 1,549.6     | -4.91 | -4.91 | -4.91 | -2.29 | 167.92 | 1.89 | 269.88 |                | 0.02                  |
| Utilities                | 415.8       | -1.86 | -1.86 | -1.86 | -1.25 | -8.67  |      |        |                |                       |

\* International and GCC Markets performance at the latest close.

### S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

U.S. crude oil fell nearly 3% on Friday, after a weak jobs report raised renewed fears that a recession could be on the horizon. The Brent October contract dropped \$2.71, or 3.41%, to settle at \$76.81 per barrel.

#### Kuwait Market

The market closed down by -1.99% at 7,070.7 value traded 53.8 million KD, Premier market value reached 45.2 million KD down by -2.16% at 7,695.3.

#### KSA Market

The market closed down by -2.42% at 11,754.4.

# 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) |
|------------------------|-------------|-------|-------|-------|-------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |        |      |        |                |                       |
| NBK                    | 0.880       | -2.22 | -2.22 | -2.76 | 2.80  | 3.36   | 1.68 | 13.19  | 3.84           | 7.38                  |
| KFH                    | 0.718       | -2.18 | -2.18 | -2.58 | 1.84  | 7.80   | 2.07 | 20.04  | 2.67           | 12.38                 |
| ZAIN                   | 0.445       | -1.77 | -1.77 | -2.20 | -0.22 | -12.23 | 1.55 | 10.11  | 7.87           | 1.94                  |
| BOUBYAN BANK           | 0.575       | -1.88 | -1.88 | -2.87 | 1.95  | 1.58   | 2.37 | 29.22  | 1.31           | 2.43                  |
| AGILITY                | 0.268       | -2.90 | -2.90 | -2.19 | -3.94 | -5.37  | 0.72 | 7.87   | 7.46           | 0.72                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |        |      |        |                |                       |
| ARAMCO                 | 27.15       | -1.27 | -1.27 | -1.63 | -2.69 | -17.73 | 4.31 | 14.97  | 6.90           | 6,567.67              |
| SABIC                  | 77.20       | -2.77 | -2.77 | -2.03 | 4.61  | -7.54  | 1.39 | 202.50 | 4.27           | 231.51                |
| STC                    | 37.15       | -3.13 | -3.13 | -3.51 | -2.49 | -5.58  | 2.42 | 13.49  | 4.31           | 185.68                |
| AL-RAJHI BANK          | 82.70       | -2.71 | -2.71 | -3.39 | 3.37  | -4.39  | 3.06 | 20.61  | 2.78           | 330.67                |
| NCB                    | 36.55       | -3.94 | -3.94 | -3.82 | 0.83  | -5.43  | 1.21 | 11.28  | 4.79           | 219.21                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |        |      |        |                |                       |
| ETISALAT.AD            | 16.84       | 1.45  | -2.43 | 2.81  | 4.60  | -14.26 | 3.34 | 13.21  | 4.84           | 146.44                |
| FAB.AD                 | 13.10       | -1.50 | 3.97  | 0.46  | 5.14  | -6.16  | 1.17 | 9.08   | 5.42           | 144.71                |
| EMIRATES NBD           | 19.05       | -1.30 | 3.25  | -0.26 | 15.45 | 10.12  | 1.03 | 5.35   | 6.30           | 120.32                |
| DB ISLAMIC DB          | 5.92        | 0.00  | 0.00  | 1.20  | 3.14  | 3.50   | 0.97 | 6.49   | 7.60           | 42.86                 |
| EMAR.DU                | 8.39        | -2.44 | -3.89 | -2.78 | 2.32  | 5.93   | 0.94 | 6.54   | 5.96           | 74.15                 |
| <b>Qatar</b>           |             |       |       |       |       |        |      |        |                |                       |
| QNB                    | 15.400      | 0.00  | 0.00  | 0.72  | 5.12  | -6.84  | 1.31 | 9.53   | 4.25           | 142.22                |
| INDUSTREIS QAT         | 12.750      | -0.70 | -0.70 | -2.60 | -1.01 | -2.52  | 2.11 | 15.96  | 6.12           | 77.13                 |
| QA ISLAMIC BK          | 19.400      | -0.67 | -0.67 | -1.52 | 4.30  | -9.77  | 1.54 | 10.92  | 3.16           | 45.83                 |
| MASRAF AL RAYA         | 2.294       | -0.99 | -0.99 | -1.55 | -1.50 | -13.60 | 0.87 | 14.92  | 4.36           | 21.33                 |
| MESAIEED PETRO         | 1.620       | -2.94 | -2.94 | -3.17 | -1.52 | -9.40  | 1.26 | 20.19  | 5.31           | 20.35                 |
| <b>Oman</b>            |             |       |       |       |       |        |      |        |                |                       |
| BANK MUSCAT            | 0.25        | -0.79 | -0.79 | -0.79 | -0.40 | -5.30  | 0.80 | 9.52   | 6.20           | 1.88                  |
| OMANTEL                | 1.000       | -0.20 | -0.20 | 0.00  | -1.48 | -5.66  | 1.22 | 11.29  | 6.00           | 0.75                  |
| BANK DHOFAR            | 0.154       | 0.00  | 0.00  | 0.00  | -6.67 | -3.75  | 0.64 | 14.54  | 5.03           | 0.46                  |
| NAT BANK OF OMAN       | 0.265       | 0.00  | 0.00  | 0.00  | 4.74  | -5.36  | 0.63 | 9.20   | 3.21           | 0.43                  |
| OMINVEST               | 0.340       | 0.00  | 0.00  | 0.00  | -4.23 | -13.99 | 0.72 | 7.39   | 5.88           | 0.23                  |

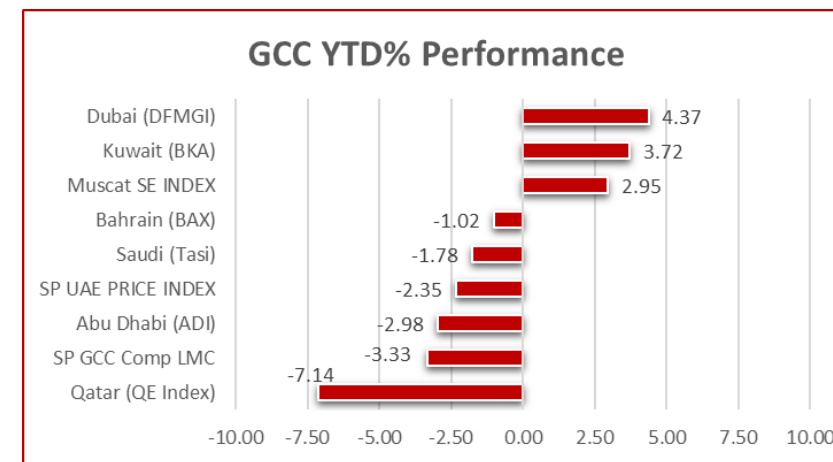
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 24-July-24      | 24.42% | 14.01% | 0.06% | 2.75% | 6.84% | 17.61% | 12.93% | 6.02% | 5.67% |
| 31-July-24      | 24.42% | 14.01% | 0.06% | 2.85% | 6.89% | 17.59% | 12.97% | 6.0%  | 5.66% |

### End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



\* GCC Markets performance at the latest close.

### Leading Sector, Security Performance

#### Kuwait

The market is down today by -1.99 %The leading sector bottom performance indices today are Technology -4.91 % Consumer services -2.73 % Consumer Disc -2.2 % respectively.

#### KSA

Saudi Armco have negative performance today by -1.27 %, SABIC have negative performance today by -2.7%, STC have negative performance today by -3.13 %, Al Rajhi Bank have negative performance today by -2.71 %.



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)