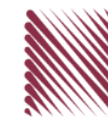


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 4th July 2024





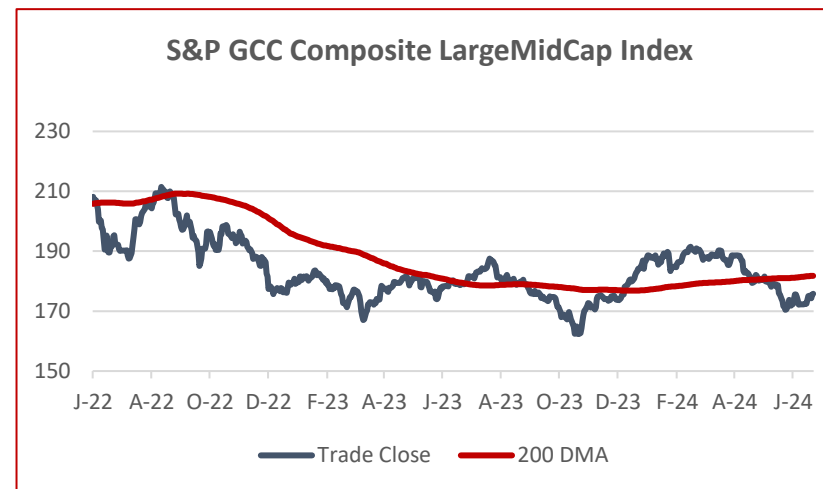
Thursday, July 4, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,688.6	0.26	0.26	0.08	0.08	-2.33	3.03	23.98	3.30	10,112.66
Qatar (QE Index)	10,123.1	0.50	0.50	1.56	1.56	-6.53	1.17	11.53	4.68	509.33
Dubai (DFMGI)	4,070.2	0.11	1.00	1.00	1.00	0.26	1.42	8.33	5.93	604.27
Abu Dhabi (ADI)	9,138.9	0.14	0.86	0.86	0.86	-4.58	2.64	16.43	2.10	2,549.58
Bahrain (BAX)	2,002.6	-0.19	-1.38	-1.13	-1.13	1.58	0.86	10.81	4.37	7.81
Muscat SE INDEX	4,688.8	0.08	0.02	0.03	0.03	3.87	0.83	10.16	5.85	7.27
SP GCC Comp LMC	175.2	0.15	0.15	0.13	0.13	-5.26	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.4	0.00	0.00	0.55	0.55	-6.87				

Developed Markets										
MSCI World Index	3,580.9	0.32	1.97	1.97	1.97	12.99				
U.S. (S&P 500)	5,567.2	0.54	1.95	1.95	1.95	16.72	4.63	27.29	1.59	49,441.19
U.K. (FTSE 100)	8,203.9	-0.45	0.49	0.49	0.49	6.09	1.74	14.76	3.72	2,138.88
Japan (topix)	2,884.2	-0.49	2.65	2.65	2.65	21.88	1.50	15.95	2.01	1,012,840.07
Emerging Markets										
MSCI EM Index	1,104.9	0.06	1.71	1.71	1.71	7.93				
China (SSE Composite)	2,949.9	-0.26	-0.59	-0.59	-0.59	-0.84	1.36	12.00		44,025.04
India (Sensex)	79,996.6	-0.07	1.22	1.22	1.22	10.74	5.04	23.77	1.13	158,001.00

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,983.9	0.45	0.24	0.68	0.68	2.44	1.43	14.99	3.67	42.03
Kuwait Premier Index	7,602.1	0.43	0.34	0.78	0.78	1.67	1.55	16.34	3.49	34.76
Kuwait Main Index	5,924.2	0.57	-0.24	0.20	0.20	6.37	1.04	10.37	4.58	7.27
Kuwait Sector										
Banking	1,724.7	0.46	0.03	0.74	0.74	4.69	1.71	17.12	3.08	25.83
Telecom	986.7	0.01	0.50	0.31	0.31	-10.72	1.45	11.76	8.52	3.02
Industrials	783.9	0.44	2.74	1.46	1.46	-13.66	0.84	11.69	5.51	2.65
Financial Services	1,319.8	0.31	0.78	0.65	0.65	8.87	1.08	11.91	3.02	4.40
Real Estate	1,314.8	0.35	1.48	1.48	1.48	8.40	1.01	14.13	2.08	2.79
Basic Materials	752.4	0.87	-1.05	-0.41	-0.41	0.86	1.35	13.19	11.64	0.42
Health Care	441.6	0.00	0.00	0.00	0.00	-8.40	1.48	12.90	1.95	
Consumer Staples	859.7	3.16	4.85	4.28	4.28	30.54	1.87	19.08	2.39	0.26
Insurance	2,381.5	0.06	-7.50	-5.49	-5.49	3.87	1.30	11.69	3.33	0.96
Consumer Discretionary	1,558.2	1.80	-0.54	1.18	1.18	-2.85				
Energy	1,057.4	1.33	1.42	2.64	2.64	11.43	0.90	9.82	6.36	0.21
Technology	1,673.3	0.44	3.14	5.50	5.50	189.31	1.94	277.11		0.02
Utilities	431.6	0.00	3.15	2.50	2.50	-5.20				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were little changed as investors eyed energy supply disruption, with the largest ports in Texas shut before Tropical Storm Beryl likely strengthens into a hurricane and makes landfall on Monday. Brent crude futures inched up 11 cents, or 0.1%, to \$86.65 a barrel.

Kuwait Market

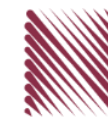
The market closed up by + 0.45% at 6,983.9 value traded 31.9 million KD, Premier market value reached 25.4 million KD up by + 0.43% at 7,602.1.

KSA Market

The market closed up by + 0.26% at 11,688.6.

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	0.12	-1.39	-0.70	-0.70	-0.17	1.67	12.84	3.92	7.07
KFH	0.713	0.56	0.42	1.13	1.13	7.05	2.09	20.98	2.57	12.10
ZAIN	0.450	-0.22	1.12	0.90	0.90	-11.24	1.57	10.22	7.78	1.94
BOUBYAN BANK	0.570	1.06	0.71	1.06	1.06	0.70	2.40	30.42	1.32	2.36
AGILITY	0.276	0.36	0.36	-1.08	-1.08	-2.55	0.74	8.10	7.25	0.75
Saudi Arabia										
ARAMCO	28.15	-0.18	-0.18	0.90	0.90	-14.70	4.47	15.53	6.66	6,774.01
SABIC	74.50	0.68	0.68	0.95	0.95	-10.78	1.34	195.42	4.43	221.93
STC	37.85	-0.26	-0.26	-0.66	-0.66	-3.80	2.35	14.05	4.23	189.94
AL-RAJHI BANK	79.50	-0.13	-0.13	-0.62	-0.62	-8.09	2.94	19.82	2.89	319.91
NCB	35.60	0.85	0.85	-1.79	-1.79	-7.89	1.18	10.99	4.92	216.84
Abu Dhabi										
ETISALAT.AD	16.00	-0.50	-0.62	-0.62	-0.62	-18.53	3.19	13.32	5.00	141.05
FAB.AD	12.50	0.81	0.32	0.32	0.32	-10.46	1.15	8.69	5.68	139.19
EMIRATES NBD	16.50	-0.60	0.00	0.00	0.00	-4.62	0.96	4.81	7.27	104.53
DB ISLAMIC DB	5.84	0.69	1.74	1.74	1.74	2.10	0.99	6.51	7.71	41.63
EMAR.DU	8.00	0.00	-2.44	-2.44	-2.44	1.01	0.89	6.23	6.25	71.94
Qatar										
QNB	14.900	0.34	0.34	1.71	1.71	-9.86	1.32	9.41	4.36	136.51
INDUSTREIS QAT	13.140	0.15	0.15	2.02	2.02	0.46	2.18	16.44	5.94	78.59
QA ISLAMIC BK	19.530	0.93	0.93	5.00	5.00	-9.16	1.61	11.16	3.71	44.90
MASRAF AL RAYA	2.327	1.04	1.04	-0.09	-0.09	-12.35	0.90	15.17	4.30	21.21
MESAIEED PETRO	1.706	1.97	1.97	3.71	3.71	-4.59	1.32	21.26	5.04	20.65
Oman										
BANK MUSCAT	0.251	0.40	0.40	0.00	0.00	-4.92	0.82	9.79	6.18	1.88
OMANTEL	1.014	0.80	1.40	-0.10	-0.10	-4.34	1.24	11.45	5.92	0.76
BANK DHOFAR	0.160	0.00	-3.03	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.256	0.00	0.39	1.19	1.19	-8.57	0.62	8.96	3.32	0.41
OMINVEST	0.340	-1.16	-5.56	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

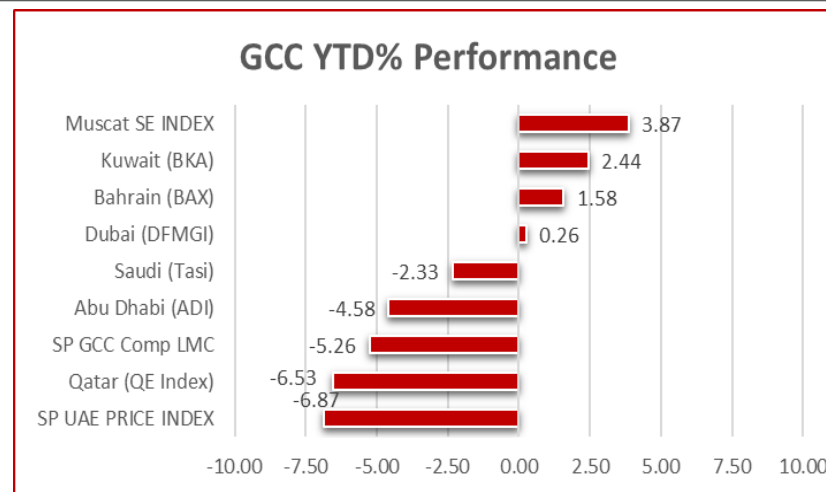
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%
26-June-24	24.48%	13.69%	0.06%	2.36%	6.29%	17.6%	12.97%	6.0%	5.60%

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 + 0.45 %The leading sector best performance indices today are Consumer services 3.16 % Consumer Disc 1.8 % Energy 1.33% respectively.

KSA

Saudi Armco has a negative performance today by – 0.18%, SABIC have a positive performance today by + 0.68%, STC have negative performance today by -0.26%, Al Rajhi Bank has negative performance today by -0.13 %



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