



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 4th September 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,128.1	-0.43	-0.14	-0.14	3.84	1.34	3.06	23.32	3.36	10,155.53
Qatar (QE Index)	10,321.1	-0.60	1.16	1.16	3.55	-4.70	1.20	11.65	4.35	521.95
Dubai (DFMGI)	4,364.8	-0.12	0.91	0.91	8.31	7.51	1.53	8.53	5.52	657.11
Abu Dhabi (ADI)	9,366.7	-0.13	0.88	0.88	3.38	-2.20	2.70	13.39	2.06	2,584.71
Bahrain (BAX)	1,944.4	-0.20	-0.67	-0.67	-4.00	-1.37	0.87	9.94	4.76	7.51
Muscat SE INDEX	4,781.1	0.07	0.73	0.73	2.00	5.91	0.85	10.16	5.71	7.45
SP GCC Comp LMC	183.6	-0.33	0.18	0.18	4.91	-0.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.0	-0.35	0.89	0.89	8.87	0.84				
Developed Markets										
MSCI World Index	3,580.1	-0.43	-2.22	-2.22	1.94	12.96				
U.S. (S&P 500)	5,520.1	-0.16	-2.27	-2.27	1.09	15.73	4.58	26.26	1.59	48,934.15
U.K. (FTSE 100)	8,269.6	-0.35	-1.28	-1.28	1.29	6.94	1.76	15.10	3.68	2,151.21
Japan (topix)	2,633.5	-3.65	-2.92	-2.92	-6.27	11.29	1.37	14.34	2.20	929,514.21
Emerging Markets										
MSCI EM Index	1,073.6	-1.52	-2.39	-2.39	-1.17	4.87				
China (SSE Composite)	2,784.3	-0.67	-2.04	-2.04	-6.17	-6.41	1.36	12.00		44,025.04
India (Sensex)	82,352.6	-0.25	-0.02	-0.02	4.20	14.00	4.40	23.89	1.11	164,334.64
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,156.5	-0.45	-0.34	-0.34	3.16	4.98	1.47	15.46	3.69	43.27
Kuwait Premier Index	7,793.3	-0.44	-0.37	-0.37	3.31	4.23	1.60	16.75	3.46	35.79
Kuwait Main Index	6,058.1	-0.50	-0.21	-0.21	2.46	8.77	1.07	10.93	4.89	7.49
Kuwait Sector										
Banking	1,763.7	-0.36	-0.85	-0.85	3.02	7.06	1.76	17.52	3.09	26.50
Telecom	1,025.1	-0.97	1.13	1.13	4.21	-7.24	1.52	12.49	8.12	3.16
Industrials	763.3	-0.57	0.32	0.32	-1.21	-15.93	0.82	11.94	5.63	2.60
Financial Services	1,403.2	-0.56	0.34	0.34	7.01	15.75	1.16	12.61	2.91	4.72
Real Estate	1,335.5	-0.90	-0.61	-0.61	3.08	10.11	1.04	14.65	2.09	2.85
Basic Materials	809.2	-0.12	-0.93	-0.93	7.11	8.49	1.46	14.00	10.81	0.46
Health Care	473.1	0.00	7.18	7.18	7.13	-1.88	1.58	17.89	2.22	
Consumer Staples	1,040.5	1.00	4.90	4.90	26.21	57.99	2.24	21.24	1.99	0.31
Insurance	1,991.7	0.46	1.53	1.53	-20.96	-13.13	1.08	10.81	4.00	0.80
Consumer Discretionary	1,772.3	-0.47	-0.06	-0.06	15.09	10.50				
Energy	1,087.6	-1.19	-1.04	-1.04	5.57	14.60	0.94	9.49	5.76	0.22
Technology	1,629.6	1.82	1.82	1.82	2.75	181.76	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 was attempting to hold its line in early trade on Thursday after an overnight sell-off, as players grappled with weak demand alongside a possible delay to more supply entering the market next month. Brent crude futures for rose 9 cents, or 0.12%, to \$72.79.

Kuwait Market

The market closed down by -0.45% at 7,156.5 value traded 46.9 million KD, Premier market value reached 28.0 million KD down by -0.44% at 7,793.3.

KSA Market

The market closed down by -0.43% at 12,128.1.

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	0.868	-0.80	-1.14	-1.14	1.40	1.95	1.66	13.01	3.90	7.22
KFH	0.725	0.00	-0.28	-0.28	2.84	8.85	2.09	20.23	2.64	12.39
ZAIN	0.475	-1.45	1.71	1.71	6.50	-6.31	1.79	11.10	7.37	2.05
BOUBYAN BANK	0.588	-0.17	0.00	0.00	4.26	3.88	2.43	29.88	1.28	2.47
AGILITY	0.253	-1.17	-1.17	-1.17	-9.32	-10.67	0.74	8.19	7.91	0.68
Saudi Arabia										
ARAMCO	27.65	-0.90	-1.07	-1.07	-0.90	-16.21	4.43	15.34	6.87	6,692.01
SABIC	74.10	-2.11	-0.94	-0.94	0.41	-11.26	1.36	115.61	4.45	222.32
STC	43.00	-0.58	0.00	0.00	12.86	9.29	2.81	15.62	3.72	215.02
AL-RAJHI BANK	89.00	0.56	1.02	1.02	11.25	2.89	3.06	21.46	2.70	356.04
NCB	35.10	0.43	0.29	0.29	-3.17	-9.18	1.16	10.73	5.13	210.62
Abu Dhabi										
ETISALAT.AD	18.30	0.55	0.88	0.88	13.66	-6.82	3.63	14.35	4.45	159.15
FAB.AD	13.30	-0.45	-0.75	-0.75	6.74	-4.73	1.19	9.22	5.34	146.93
EMIRATES NBD	20.25	-0.25	2.79	2.79	22.73	17.05	1.10	5.68	5.93	127.91
DB ISLAMIC DB	6.15	-0.49	-0.32	-0.32	7.14	7.52	1.00	6.74	7.32	44.53
EMAR.DU	8.76	-1.02	3.79	3.79	6.83	10.61	1.00	6.44	5.71	77.43
Qatar										
QNB	15.900	-0.13	0.38	0.38	8.53	-3.81	1.35	9.84	4.12	146.86
INDUSTREIS QAT	13.030	-0.53	1.01	1.01	1.16	-0.38	2.10	15.12	5.37	78.83
QA ISLAMIC BK	20.000	-0.79	2.35	2.35	7.53	-6.98	1.59	11.26	3.06	47.26
MASRAF AL RAYA	2.358	-0.72	2.52	2.52	1.25	-11.19	0.90	15.33	4.24	21.93
MESAIEED PETRO	1.662	-1.54	0.73	0.73	1.03	-7.05	1.27	23.30	4.21	20.88
Oman										
BANK MUSCAT	0.262	0.00	1.55	1.55	4.38	-0.76	0.83	9.98	5.92	1.97
OMANTEL	1.000	-0.89	-0.89	-0.89	-1.48	-5.66	1.21	11.70	6.00	0.75
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	0.350	0.57	6.06	6.06	-1.41	-11.46	0.77	8.44	5.71	0.23

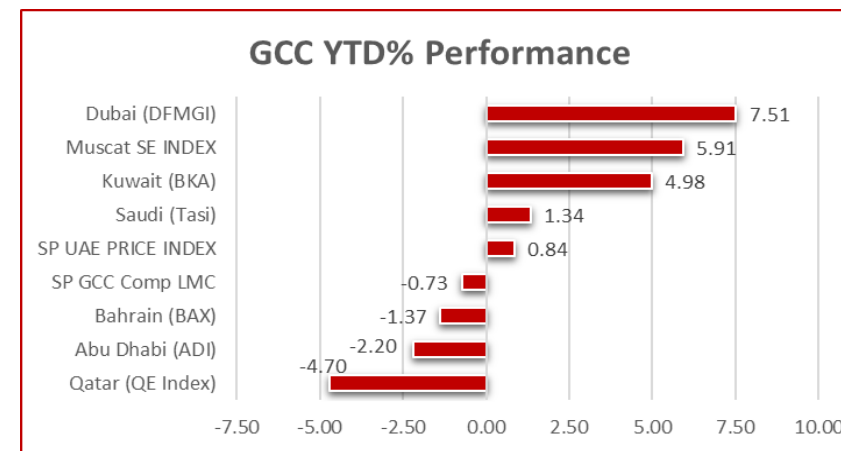
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
21-August 24	24.57%	14.80%	0.06%	3.30%	7.67%	17.58%	12.97%	5.97%	5.74%
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%

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 down today by -0.45 %The leading sector bottom performance indices today are Energy -1.19 % Telecom -0.97 % Real estate -0.9 % respectively.

KSA

Saudi Armco have negative performance today by -0.9 %, SABIC have negative performance today by -2.1%, STC have negative performance today by -0.58 %, Al Rajhi Bank has a positive performance today by + 0.56 %.



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