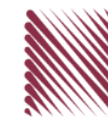


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday ,5th August 2024





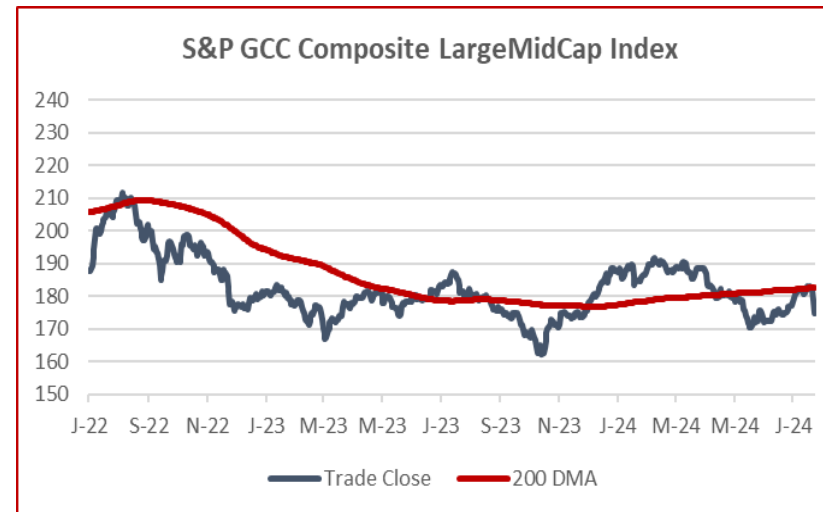
Monday, August 5, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,504.5	-2.13	-4.49	-5.00	-1.50	-3.87	2.76	21.51	3.35	9,745.94
Qatar (QE Index)	10,057.2	0.00	-0.73	-0.95	0.90	-7.14	1.17	11.34	4.62	507.64
Dubai (DFMGI)	4,045.9	-4.52	-4.52	-5.20	0.39	-0.34	1.41	8.10	5.97	609.27
Abu Dhabi (ADI)	8,974.7	-3.42	-3.42	-3.90	-0.95	-6.30	2.59	15.94	2.15	2,477.83
Bahrain (BAX)	1,931.2	-1.03	-2.01	-1.96	-4.65	-2.04	0.86	10.94	4.67	7.46
Muscat SE INDEX	4,602.3	-0.97	-1.40	-1.27	-1.81	1.95	0.82	9.73	5.94	7.15
SP GCC Comp LMC	175.0	-2.14	-3.88	-4.36	-0.03	-5.41	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	127.6	-5.22	-5.22	-5.85	-0.08	-7.45				

Developed Markets										
MSCI World Index	3,342.7	-3.08	-3.08	-6.41	-4.81	5.48				
U.S. (S&P 500)	5,186.3	-3.00	-3.00	-6.08	-5.02	8.73	4.41	25.53	1.65	47,264.78
U.K. (FTSE 100)	8,008.2	-2.04	-2.04	-4.30	-1.91	3.56	1.69	14.53	3.82	2,085.39
Japan (topix)	2,227.2	-12.23	-12.23	-20.30	-20.73	-5.88	1.16	12.28	2.60	787,132.29
Emerging Markets										
MSCI EM Index	1,016.5	-4.22	-4.22	-6.30	-6.42	-0.71				
China (SSE Composite)	2,860.7	-1.54	-1.54	-2.66	-3.60	-3.84	1.36	12.00		44,025.04
India (Sensex)	78,759.4	-2.74	-2.74	-3.65	-0.35	9.02	4.36	23.05	1.16	156,280.20

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,927.3	-2.03	-3.98	-4.31	-0.14	1.61	1.45		3.67	42.57
Kuwait Premier Index	7,543.7	-1.97	-4.09	-4.50	0.00	0.89	1.57		3.50	35.18
Kuwait Main Index	5,864.3	-2.30	-3.41	-3.37	-0.81	5.29	1.06	9.91	4.51	7.39
Kuwait Sector										
Banking	1,723.7	-1.93	-4.05	-4.47	0.68	4.63	1.74	17.38	3.09	26.31
Telecom	957.1	-1.52	-3.17	-3.56	-2.71	-13.40	1.42	11.49	8.65	2.97
Industrials	746.4	-2.89	-4.83	-4.91	-3.39	-17.79	0.82	9.67	5.62	2.60
Financial Services	1,296.6	-2.95	-4.92	-4.98	-1.12	6.96	1.09		2.99	4.47
Real Estate	1,291.4	-1.72	-2.85	-3.14	-0.32	6.47	1.01	14.15	2.08	2.79
Basic Materials	732.2	-1.10	-2.77	-2.38	-3.09	-1.85	1.33	12.99	11.83	0.42
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	952.5	1.17	-1.59	-3.07	15.54	44.62	2.04	20.90	2.18	0.29
Insurance	2,360.0	0.16	-0.34	-0.58	-6.34	2.93	1.28	11.58	3.37	0.95
Consumer Discretionary	1,584.5	-4.11	-6.22	-6.44	2.89	-1.21				
Energy	1,028.4	-2.43	-3.19	-4.16	-0.17	8.37	0.90	9.79	6.31	0.21
Technology	1,578.7	1.88	-3.13	-3.13	-0.46	172.96	1.80	256.63		0.02
Utilities	402.6	-3.17	-4.97	-4.97	-4.37	-11.56				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices climbed more than \$1 on Tuesday, paring the previous day's loss as concern that an escalating Middle East conflict could hit supplies outweighed fear of a possible U.S. recession that could hurt demand in the world's biggest oil consumer. Brent crude futures gained \$1.25, or 1.6%, to \$77.55 a barrel.

Kuwait Market

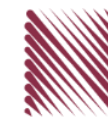
The market closed down by -2.03% at 6,927.3 value traded 65.8 million KD, Premier market value reached 56.9 million KD down by -1.97% at 7,695.3.

KSA Market

The market closed down by -2.13% at 11,504.5

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	0.852	-3.18	-5.33	-5.86	-0.47	0.07	1.63	12.77	3.97	7.16
KFH	0.709	-1.25	-3.41	-3.80	0.57	6.45	2.05	19.79	2.70	12.23
ZAIN	0.439	-1.35	-3.09	-3.52	-1.57	-13.41	1.53	9.97	7.97	1.90
BOUBAYAN BANK	0.568	-1.22	-3.07	-4.05	0.71	0.35	2.34	28.86	1.33	2.40
AGILITY	0.256	-4.48	-7.25	-6.57	-8.24	-9.61	0.69	7.52	7.81	0.70
Saudi Arabia										
ARAMCO	26.80	-1.29	-2.55	-2.90	-3.94	-18.79	4.26	14.78	6.99	6,482.14
SABIC	74.90	-2.98	-5.67	-4.95	1.49	-10.30	1.35	196.47	4.41	224.58
STC	37.15	0.00	-3.13	-3.51	-2.49	-5.58	2.42	13.49	4.31	185.65
AL-RAJHI BANK	84.20	1.81	-0.94	-1.64	5.25	-2.66	3.11	20.99	2.85	336.62
NCB	34.65	-5.20	-8.94	-8.82	-4.41	-10.35	1.14	10.70	5.05	207.79
Abu Dhabi										
ETISALAT.AD	16.36	-2.85	-2.85	-0.12	1.61	-16.70	3.24	12.83	4.98	142.61
FAB.AD	12.14	-7.33	-7.33	-6.90	-2.57	-13.04	1.09	8.41	5.85	135.43
EMIRATES NBD	18.35	-3.67	-3.67	-3.93	11.21	6.07	1.00	5.15	6.54	116.21
DB ISLAMIC DB	5.65	-4.56	-4.56	-3.42	-1.57	-1.22	0.92	6.19	7.96	41.27
EMAR.DU	7.75	-7.63	-7.63	-10.20	-5.49	-2.15	0.86	6.04	6.45	69.38
Qatar										
QNB	15.420	0.13	0.13	0.85	5.26	-6.72	1.31	9.55	4.25	142.46
INDUSTREIS QAT	12.970	1.73	1.01	-0.92	0.70	-0.84	2.15	16.23	6.01	78.49
QA ISLAMIC BK	19.600	1.03	0.36	-0.51	5.38	-8.84	1.56	11.04	3.13	46.33
MASRAF AL RAYA	2.215	-3.44	-4.40	-4.94	-4.89	-16.57	0.84	14.40	4.51	20.61
MESAIEED PETRO	1.594	-1.60	-4.49	-4.72	-3.10	-10.85	1.24	19.87	5.40	20.03
Oman										
BANK MUSCAT	0.248	-0.80	-1.59	-1.59	-1.20	-6.06	0.79	9.44	6.25	1.87
OMANTEL	0.981	-1.90	-2.10	-1.90	-3.35	-7.45	1.20	11.07	6.12	0.74
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	0.338	-0.59	-0.59	-0.59	-4.79	-14.49	0.71	7.34	5.92	0.23

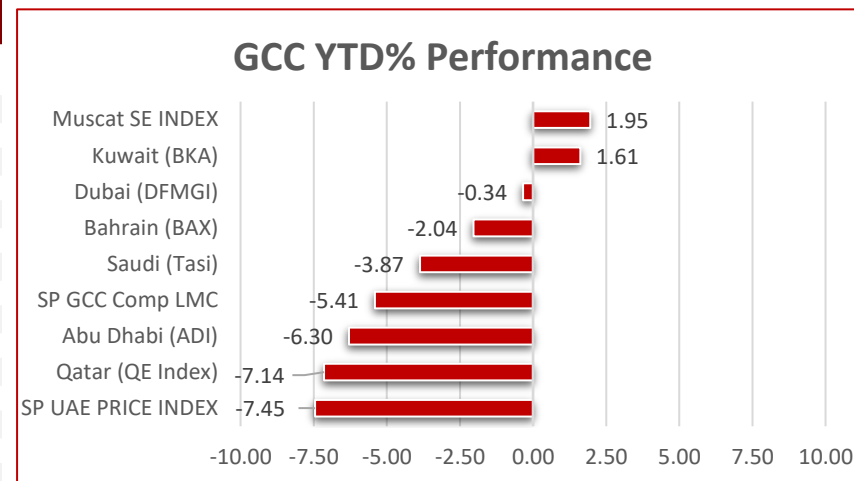
* GCC Markets performance at the latest close.

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

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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 -2.03 %The leading sector bottom performance indices today are Consumer Disc -4.11 % Utilities -3.17 % Financial services -2.95 % respectively.

KSA

Saudi Armco have negative performance today by -1.29 %, SABIC have negative performance today by -2.97%. STC flat performance today 0 %, Al Rajhi Bank has a positive performance today by + 1.81 %



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