

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

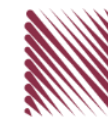
GCC DAILY MORNING BRIEF

Tuesday, 5th November 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

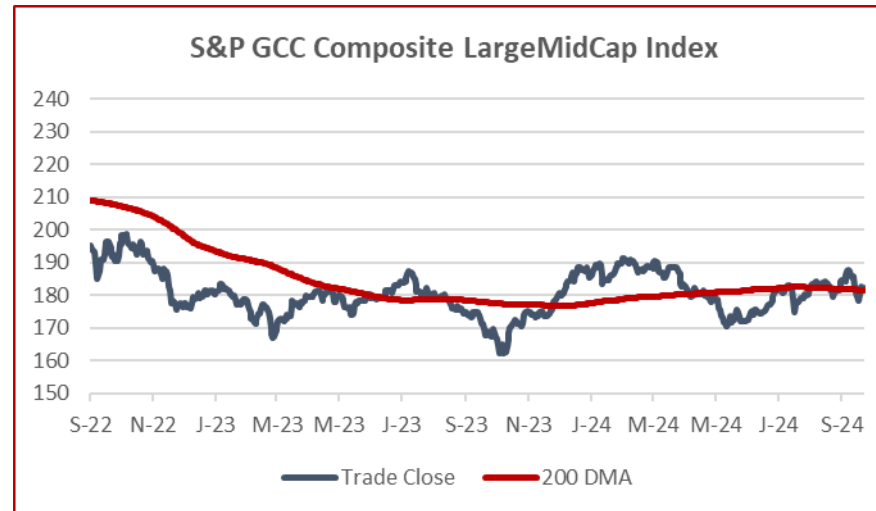


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,039.3	-0.07	0.14	0.14	-1.53	0.60	3.02	22.92	3.03	10,133.14
Qatar (QE Index)	10,545.4	0.36	0.20	0.20	-0.65	-2.63	1.23	11.71	4.25	535.44
Dubai (DFMGI)	4,585.2	-0.78	-0.78	-0.13	1.81	12.94	1.62	9.04	5.21	688.49
Abu Dhabi (ADI)	9,330.5	-0.20	-0.20	0.03	-1.01	-2.58	2.71	16.55	2.06	2,626.95
Bahrain (BAX)	2,019.3	0.02	0.02	0.02	0.32	2.42	0.92	10.59	4.50	7.82
Muscat SE INDEX	4,718.2	-0.62	-0.66	-0.66	0.17	4.52	0.84	9.92	5.85	7.31
SP GCC Comp LMC	183.5	-0.17	0.00	0.19	-1.16	-0.80	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.3	-0.83	-0.83	-0.02	-1.14	1.82				

Developed Markets										
MSCI World Index	3,656.1	-0.11	-0.11	0.25	-1.80	15.37				
U.S. (S&P 500)	5,712.7	-0.28	-0.28	0.13	-0.86	19.77	4.74	27.47	1.57	50,965.94
U.K. (FTSE 100)	8,184.2	0.09	0.09	0.91	-0.64	5.83	1.71	15.68	3.72	2,123.48
Japan (topix)	2,644.3	-1.90	0.99	-1.90	-0.06	11.74	1.38	14.47	2.25	930,575.91
Emerging Markets										
MSCI EM Index	1,129.8	0.67	0.67	0.92	-3.50	10.36				
China (SSE Composite)	3,310.2	1.17	1.17	0.93	-0.79	11.27	1.36	12.00		44,025.04
India (Sensex)	78,782.2	-1.18	-1.18	-0.76	-6.55	9.06	4.21	22.57	1.17	155,070.80

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,124.1	-0.10	-0.47	-0.47	-0.17	4.50	1.46	15.14	3.95	42.95
Kuwait Premier Index	7,649.5	0.00	-0.29	-0.29	-0.77	2.31	1.56	16.02	3.81	34.98
Kuwait Main Index	6,439.9	-0.58	-1.29	-1.29	2.60	15.62	1.14	11.93	4.64	7.97
Kuwait Sector										
Banking	1,742.3	0.06	-0.23	-0.23	-0.62	5.76	1.73	16.87	3.14	26.08
Telecom	1,001.8	-0.35	-1.15	-1.15	-2.56	-9.35	1.47	12.16	8.36	3.07
Industrials	694.6	-0.65	-0.55	-0.55	-4.28	-23.50	0.75	10.82	10.11	2.37
Financial Services	1,440.7	-0.44	-0.61	-0.61	2.13	18.85	1.18	12.68	2.83	4.84
Real Estate	1,383.2	-0.62	-1.84	-1.84	0.55	14.04	1.07	15.16	2.06	2.95
Basic Materials	847.3	-0.61	-0.32	-0.32	4.96	13.59	1.53	12.93	10.27	0.48
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,080.6	-0.60	-0.63	-0.63	7.64	64.08	2.36	22.42	1.89	0.33
Insurance	2,055.4	0.24	-0.51	-0.51	-1.36	-10.35	1.12	11.18	3.87	0.83
Consumer Discretionary	1,981.3	0.78	0.21	0.21	9.69	23.53				
Energy	1,129.6	-1.34	-1.75	-1.75	1.07	19.03	0.98	9.68	5.53	0.23
Technology	1,091.3	3.45	0.67	0.67	-24.62	88.68	1.22	439.39		0.01
Utilities	405.3	0.00	-0.64	-0.64	4.05	-10.98				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased slightly on Tuesday as markets braced for uncertainties from the U.S. presidential election, after rising more than 2% in the past session as OPEC+ delayed plans to hike production in December and eased supply concerns. Brent crude futures fell 15 cents, or 0.2%, to \$74.93 a barrel.

Kuwait Market

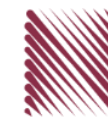
The market down by -0.10% at 7,131.52 value traded 50.4 million KD, Premier market value reached 26.7 million KD down by -0.00% at 7,649.45

KSA Market

The market closed down by -0.07% at 12,039.3.

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	0.854	0.23	0.47	0.47	-3.28	0.30	1.61	12.59	3.96	7.10
KFH	0.721	0.28	0.00	0.00	0.70	8.25	2.07	19.66	2.66	12.31
ZAIN	0.454	-0.22	-0.44	-0.44	-4.42	-10.45	1.71	10.61	7.71	1.96
BOUBYAN BANK	0.556	0.00	-0.36	-0.36	-2.46	-1.77	2.25	26.90	1.36	2.33
AGILITY	0.248	0.00	-0.40	-0.40	13.24	-12.43	0.72	8.02	8.06	0.66
Saudi Arabia										
ARAMCO	27.50	1.48	1.85	1.85	1.48	-16.67	4.41	15.26	6.91	6,651.63
SABIC	72.50	-0.41	-0.28	-0.28	-3.20	-13.17	1.33	113.12	4.55	217.39
STC	42.30	0.59	0.36	0.36	-3.20	7.51	2.76	15.36	3.78	211.39
AL-RAJHI BANK	88.60	0.68	0.68	0.68	1.61	2.43	3.01	20.25	2.71	354.22
NCB	32.85	-1.50	-0.90	-0.90	-4.23	-15.01	1.07	9.86	5.48	197.00
Abu Dhabi										
ETISALAT.AD	17.50	-1.57	-1.57	-1.24	-5.41	-10.90	3.52	13.74	4.66	152.18
FAB.AD	13.32	-0.60	-0.60	1.37	-3.06	-4.58	1.14	9.12	5.33	147.15
EMIRATES NBD	19.65	1.55	1.55	3.42	-3.20	13.58	1.01	5.51	6.11	124.11
DB ISLAMIC DB	6.25	-0.16	-0.16	0.00	-0.79	9.27	1.02	6.85	7.20	45.25
EMAR.DU	8.77	-0.79	-0.79	0.92	0.57	10.73	1.00	6.45	5.70	77.51
Qatar										
QNB	17.300	0.23	-0.29	-0.29	2.06	4.66	1.43	10.51	3.79	159.79
INDUSTREIS QAT	13.480	0.30	0.97	0.97	3.37	3.06	2.21	15.27	5.19	81.55
QA ISLAMIC BK	20.780	0.92	1.37	1.37	-2.67	-3.35	1.62	11.43	2.95	49.10
MASRAF AL RAYA	2.370	0.81	-0.08	-0.08	-4.05	-10.73	0.88	15.14	4.22	22.04
MESAEED PETRO	1.584	0.70	0.13	0.13	-2.82	-11.41	1.23	24.86	4.42	19.90
Oman										
BANK MUSCAT	0.254	-1.17	-1.55	-1.55	0.79	-3.79	0.79	9.47	6.10	1.91
OMANTEL	0.985	-0.20	-0.30	-0.30	-0.20	-7.08	1.19	11.52	6.09	0.74
BANK DHOFAR	0.177	0.00	0.00	0.00	12.74	10.63	0.72	19.84	4.38	0.53
NAT BANK OF OMAN	0.299	0.00	-0.33	-0.33	3.10	6.79	0.69	10.20	2.84	0.49
OMINVEST	0.357	-0.83	-2.19	-2.19	1.42	-9.69	0.79	8.61	5.60	0.24

* GCC Markets performance at the latest close.

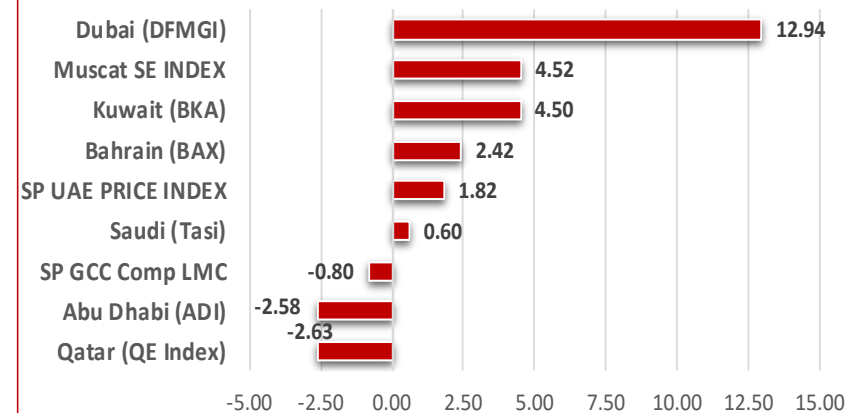
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
23-October. 24	24.71%	15.85%	0.06%	3.71%	7.76%	17.64%	13.00%	6.16%	5.87%
30-October. 24	24.69%	15.88%	0.06%	3.69%	7.80%	17.65%	13.08%	6.14%	5.91%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

KSA

Saudi Armco has a positive performance today by + 1.48 %, SABIC have negative performance today by -0.41%. STC has a positive performance today by + 0.59 %, Al Rajhi Bank has a positive performance today by + 0.68 %



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