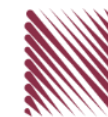


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 5th September 2024





Thursday, September 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)	12,099.5	-0.24	-0.38	-0.38	3.60	1.10	3.07	23.38	3.37	10,122.48
Qatar (QE Index)	10,323.3	0.02	1.18	1.18	3.57	-4.68	1.20	11.65	4.34	522.51
Dubai (DFMGI)	4,372.9	0.04	1.10	1.10	8.51	7.71	1.54	8.57	5.50	658.80
Abu Dhabi (ADI)	9,448.1	-0.31	1.76	1.76	4.27	-1.36	2.73	13.50	2.04	2,607.45
Bahrain (BAX)	1,946.6	0.11	-0.56	-0.56	-3.90	-1.26	0.87	9.95	4.76	7.52
Muscat SE INDEX	4,760.8	-0.42	0.30	0.30	1.57	5.47	0.85	10.10	5.74	7.41
SP GCC Comp LMC	183.7	-0.07	0.21	0.21	4.95	-0.69	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.6	-0.30	1.30	1.30	9.31	1.25				

Developed Markets										
MSCI World Index	3,518.6	-1.37	-3.90	-3.90	0.19	11.02				
U.S. (S&P 500)	5,408.4	-1.73	-4.25	-4.25	-0.95	13.39	4.48	25.75	1.63	47,874.00
U.K. (FTSE 100)	8,181.5	-0.73	-2.33	-2.33	0.21	5.80	1.74	14.94	3.72	2,127.07
Japan (topix)	2,597.4	-0.89	-4.25	-4.25	-7.55	9.76	1.36	14.14	2.23	917,153.78
Emerging Markets										
MSCI EM Index	1,074.9	-0.11	-2.28	-2.28	-1.05	5.00				
China (SSE Composite)	2,765.8	-0.81	-2.69	-2.69	-6.79	-7.03	1.36	12.00		44,025.04
India (Sensex)	81,183.9	-1.24	-1.43	-1.43	2.72	12.38	4.33	23.55	1.12	162,022.57

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,186.7	0.42	0.08	0.08	3.60	5.42	1.47	15.45	3.69	43.26
Kuwait Premier Index	7,819.2	0.33	-0.04	-0.04	3.65	4.58	1.60	16.73	3.46	35.75
Kuwait Main Index	6,109.9	0.85	0.65	0.65	3.34	9.70	1.08	10.92	4.88	7.51
Kuwait Sector										
Banking	1,769.0	0.30	-0.55	-0.55	3.33	7.38	1.76	17.51	3.09	26.48
Telecom	1,027.6	0.24	1.37	1.37	4.46	-7.02	1.50	12.40	8.18	3.14
Industrials	767.2	0.52	0.84	0.84	-0.70	-15.50	0.82	11.93	5.63	2.60
Financial Services	1,424.4	1.51	1.85	1.85	8.62	17.50	1.17	12.68	2.89	4.76
Real Estate	1,341.5	0.44	-0.16	-0.16	3.54	10.60	1.03	14.53	2.10	2.84
Basic Materials	810.5	0.16	-0.77	-0.77	7.28	8.66	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	1,009.7	-2.96	1.79	1.79	22.47	53.31	2.19	20.82	2.04	0.31
Insurance	1,997.8	0.31	1.84	1.84	-20.71	-12.87	1.09	10.84	3.97	0.81
Consumer Discretionary	1,781.3	0.51	0.44	0.44	15.67	11.06				
Energy	1,087.1	-0.04	-1.08	-1.08	5.52	14.56	0.93	9.36	5.83	0.22
Technology	1,666.0	2.23	4.09	4.09	5.05	188.05	1.93	693.94		0.02
Utilities	400.0	-0.65	-0.65	-0.65	-5.00	-12.14				

* 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 hit the lowest level since June 2023, putting the benchmark on pace for its worst week in nearly a year, as OPEC+ has failed to reassure the market about the global supply and demand balance. U.S. crude hit a low of \$67.17 earlier in the session and shed 8% for its worst week since October. The Brent global benchmark has fallen 9.8% this week. Brent November contract: \$71.06 per barrel, down \$1.63, or 2.2%. Year to date, the global benchmark has declined 7.8%.

Kuwait Market

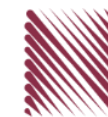
The market closed up by +0.42% at 7,186.7 value traded 68.2 million KD, Premier market value reached 29.7 million KD up by +0.33% at 7,819.2.

KSA Market

The market closed down by -0.24% at 12,099.5.

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	0.874	0.69	-0.46	-0.46	2.10	2.65	1.67	13.10	3.87	7.27
KFH	0.724	-0.14	-0.41	-0.41	2.70	8.70	2.09	20.21	2.65	12.35
ZAIN	0.475	0.00	1.71	1.71	6.50	-6.31	1.79	11.10	7.37	2.06
BOUBYAN BANK	0.588	0.00	0.00	0.00	4.26	3.88	2.43	29.88	1.28	2.46
AGILITY	0.256	1.19	0.00	0.00	-8.24	-9.61	0.75	8.28	7.81	0.69
Saudi Arabia										
ARAMCO	27.55	-0.36	-1.43	-1.43	-1.25	-16.52	4.42	15.29	6.90	6,667.10
SABIC	73.80	-0.40	-1.34	-1.34	0.00	-11.62	1.35	115.15	4.47	221.40
STC	42.65	-0.81	-0.81	-0.81	11.94	8.40	2.78	15.49	3.75	213.25
AL-RAJHI BANK	88.70	-0.34	0.68	0.68	10.88	2.54	3.05	21.39	2.71	354.80
NCB	35.40	0.85	1.14	1.14	-2.34	-8.41	1.17	10.82	5.08	212.40
Abu Dhabi										
ETISALAT.AD	18.58	-1.40	0.99	0.99	13.79	-6.72	3.63	14.37	4.45	159.32
FAB.AD	13.36	-0.45	-0.75	-0.75	6.74	-4.73	1.19	9.22	5.34	146.93
EMIRATES NBD	20.30	0.25	3.05	3.05	23.03	17.34	1.10	5.70	5.91	128.23
DB ISLAMIC DB	6.14	-0.65	-0.49	-0.49	6.97	7.34	1.00	6.73	7.33	44.46
EMAR.DU	8.71	-0.80	3.20	3.20	6.22	9.97	1.00	6.40	5.74	76.99
Qatar										
QNB	15.920	0.13	0.51	0.51	8.67	-3.69	1.35	9.86	4.11	147.04
INDUSTREIS QAT	13.030	0.00	1.01	1.01	1.16	-0.38	2.10	15.12	5.37	78.83
QA ISLAMIC BK	20.000	0.00	2.35	2.35	7.53	-6.98	1.59	11.26	3.06	47.26
MASRAF AL RAYA	2.369	0.47	3.00	3.00	1.72	-10.77	0.90	15.41	4.22	22.03
MESAIEED PETRO	1.664	0.12	0.85	0.85	1.16	-6.94	1.27	23.33	4.21	20.91
Oman										
BANK MUSCAT	0.26	-0.76	0.78	0.78	3.59	-1.52	0.83	9.90	5.96	1.95
OMANTEL	1.006	0.60	-0.30	-0.30	-0.89	-5.09	1.22	11.77	5.96	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	0.00	6.06	6.06	-1.41	-11.46	0.77	8.44	5.71	0.23

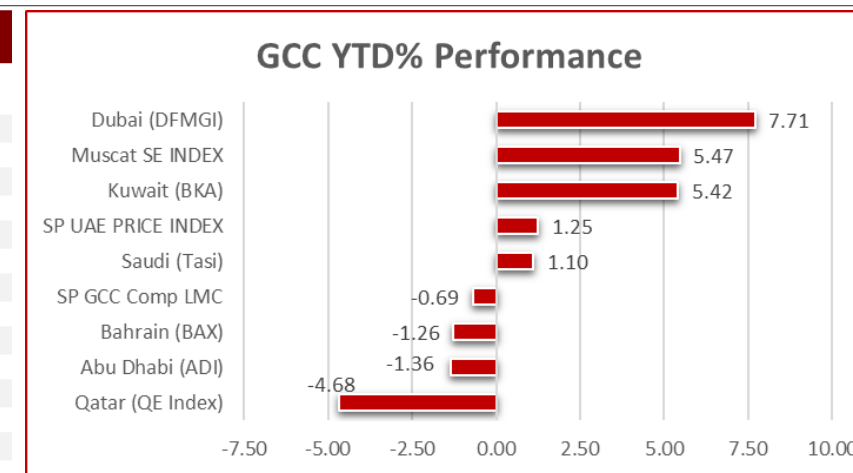
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%
04-Sept. 24	24.65%	15.09%	0.06%	3.53%	7.78%	17.58%	12.96%	5.96%	5.62%

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 + 0.42 %The leading sector best performance indices today are Technology 2.23 % Financial services 1.51 % Industrials 0.52 % respectively.

KSA

Saudi Armco have negative performance today by -0.36 %, SABIC have negative performance today by -0.40%, STC have negative performance today by -0.81 %, Al Rajhi Bank have negative performance today by -0.34 %.



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