

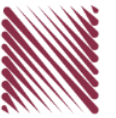


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday ,6th August 2024

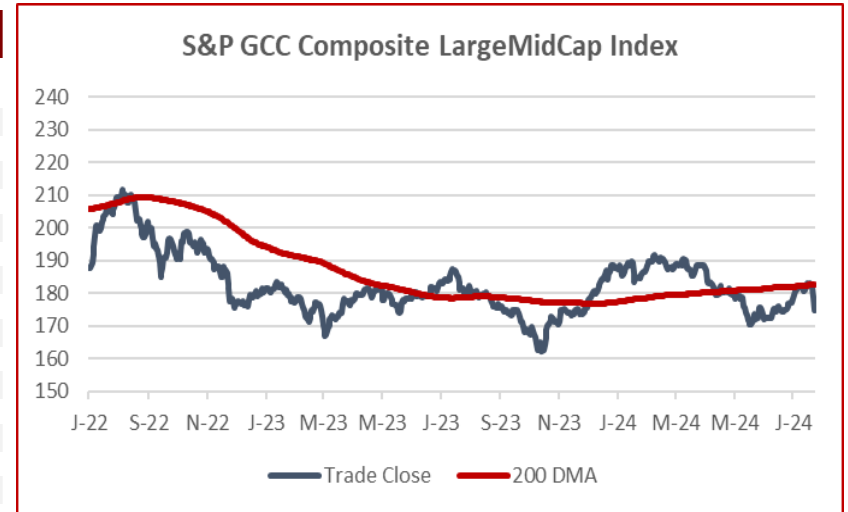




Tuesday, August 6, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,679.2	1.52	-3.04	-3.55	0.00	-2.41	2.90	22.57	3.34	9,894.49
Qatar (QE Index)	10,049.0	-0.08	-0.81	-1.03	0.82	-7.22	1.17	11.33	4.63	506.98
Dubai (DFMGI)	4,137.3	2.26	-2.36	-3.06	2.66	1.91	1.44	8.28	5.84	626.24
Abu Dhabi (ADI)	9,083.7	1.21	-2.24	-2.73	0.25	-5.16	2.62	16.12	2.12	2,510.86
Bahrain (BAX)	1,929.6	-0.08	-2.10	-2.04	-4.73	-2.12	0.86	10.91	4.68	7.46
Muscat SE INDEX	4,648.7	1.01	-0.40	-0.28	-0.82	2.98	0.83	9.84	5.87	7.23
SP GCC Comp LMC	177.2	1.29	-2.63	-3.13	1.26	-4.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	130.9	2.64	-2.71	-3.36	2.56	-5.00				
Developed Markets										
MSCI World Index	3,380.9	1.14	-1.97	-5.34	-3.73	6.68				
U.S. (S&P 500)	5,240.0	1.04	-1.99	-5.11	-4.04	9.86	4.28	24.73	1.70	45,914.05
U.K. (FTSE 100)	8,026.7	0.23	-1.81	-4.08	-1.68	3.79	1.69	14.57	3.82	2,089.64
Japan (topix)	2,434.2	9.30	-4.07	-12.89	-13.36	2.87	1.27	13.36	2.38	859,262.80
Emerging Markets										
MSCI EM Index	1,030.9	1.41	-2.86	-4.97	-5.10	0.70				
China (SSE Composite)	2,867.3	0.23	-1.31	-2.43	-3.37	-3.62	1.36	12.00		44,025.04
India (Sensex)	78,593.1	-0.21	-2.95	-3.85	-0.56	8.79	4.34	22.93	1.16	156,073.16
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,995.9	0.99	-3.03	-3.36	0.85	2.62	1.42	9.35	3.75	41.70
Kuwait Premier Index	7,624.6	1.07	-3.06	-3.48	1.07	1.97	1.54	9.28	3.57	34.49
Kuwait Main Index	5,898.8	0.59	-2.85	-2.80	-0.23	5.91	1.03	9.70	4.62	7.21
Kuwait Sector										
Banking	1,741.6	1.04	-3.06	-3.48	1.73	5.71	1.71	17.04	3.15	25.81
Telecom	977.1	2.09	-1.14	-1.54	-0.67	-11.59	1.40	11.31	8.78	2.92
Industrials	755.3	1.19	-3.71	-3.78	-2.25	-16.81	0.80	9.40	5.78	2.53
Financial Services	1,303.0	0.50	-4.45	-4.50	-0.63	7.49	1.06	2.03	3.05	4.34
Real Estate	1,294.5	0.24	-2.61	-2.91	-0.08	6.73	0.99	13.92	2.12	2.73
Basic Materials	735.2	0.42	-2.36	-1.97	-2.68	-1.43	1.32	12.85	11.96	0.41
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	959.0	0.68	-0.92	-2.41	16.32	45.61	2.07	21.14	2.16	0.29
Insurance	2,327.6	-1.37	-1.70	-1.95	-7.62	1.52	1.29	11.60	3.36	0.95
Consumer Discretionary	1,624.2	2.50	-3.87	-4.09	5.47	1.27				
Energy	1,035.6	0.70	-2.51	-3.49	0.52	9.12	0.88	9.56	6.38	0.21
Technology	1,564.1	-0.92	-4.02	-4.02	-1.38	170.44	1.83	261.45		0.02
Utilities	415.8	3.27	-1.86	-1.86	-1.25	-8.67				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slipped in early Asian trading on Wednesday following a brief rebound in the previous session after industry data showed an unexpected build in U.S. crude oil and gasoline inventories, offsetting global oil supply concerns. Brent crude futures fell 21 cents, or 0.27%, to \$76.27 a barrel.

Kuwait Market

The market closed up by +0.99% at 6,995.9 value traded 58.6 million KD, Premier market value reached 50.4 million KD up by +1.07% at 7,624.6.

KSA Market

The market closed up by +1.52% at 11,679.2

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



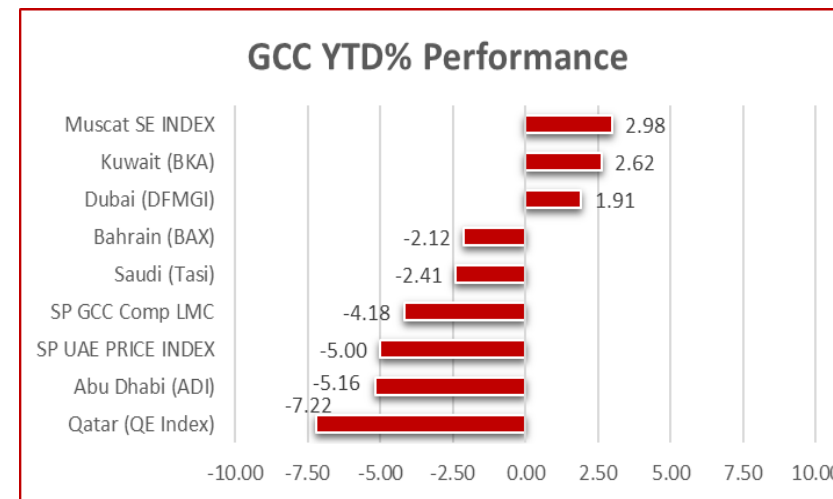
* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.854	0.23	-5.11	-5.64	-0.23	0.30	1.63	12.80	3.96	7.15
KFH	0.720	1.55	-1.91	-2.31	2.13	8.10	2.08	20.09	2.66	12.38
ZAIN	0.450	2.51	-0.66	-1.10	0.90	-11.24	1.57	10.22	7.78	1.96
BOUBYAN BANK	0.578	1.76	-1.37	-2.36	2.48	2.11	2.38	29.37	1.31	2.44
AGILITY	0.263	2.73	-4.71	-4.01	-5.73	-7.14	0.71	7.72	7.60	0.71
Saudi Arabia										
ARAMCO	27.20	1.49	-1.09	-1.45	-2.51	-17.58	4.32	15.00	6.98	6,577.31
SABIC	75.70	1.07	-4.66	-3.93	2.57	-9.34	1.36	198.57	4.36	226.92
STC	38.15	2.69	-0.52	-0.91	0.13	-3.04	2.49	13.85	4.19	190.60
AL-RAJHI BANK	85.00	0.95	0.00	-0.70	6.25	-1.73	3.14	21.19	2.82	339.74
NCB	34.70	0.14	-8.80	-8.68	-4.28	-10.22	1.15	10.71	5.19	208.04
Abu Dhabi										
ETISALAT.AD	16.90	3.30	0.36	3.17	4.97	-13.95	3.35	13.25	4.82	146.96
FAB.AD	12.40	2.14	-5.34	-4.91	-0.48	-11.17	1.11	8.59	5.73	136.97
EMIRATES NBD	18.95	3.27	-0.52	-0.79	14.85	9.54	1.03	5.32	6.33	119.68
DB ISLAMIC DB	5.75	1.77	-2.87	-1.71	0.17	0.52	0.94	6.30	7.83	41.63
EMAR.DU	7.92	2.19	-5.60	-8.23	-3.41	0.00	0.88	6.17	6.31	69.99
Qatar										
QNB	15.300	-0.78	-0.65	0.07	4.44	-7.44	1.30	9.47	4.28	141.30
INDUSTREIS QAT	12.900	-0.54	0.47	-1.45	0.16	-1.38	2.14	16.14	6.05	78.03
QA ISLAMIC BK	19.570	-0.15	0.20	-0.66	5.22	-8.98	1.56	11.02	3.13	46.24
MASRAF AL RAYA	2.227	0.54	-3.88	-4.42	-4.38	-16.12	0.85	14.48	4.49	20.71
MESAIEED PETRO	1.635	2.57	-2.04	-2.27	-0.61	-8.56	1.27	20.38	5.26	20.54
Oman										
BANK MUSCAT	0.252	1.61	0.00	0.00	0.40	-4.55	0.80	9.60	6.15	1.89
OMANTEL	0.998	1.73	-0.40	-0.20	-1.67	-5.85	1.22	11.27	6.01	0.75
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	0.339	0.30	-0.29	-0.29	-4.51	-14.24	0.72	7.36	5.90	0.23

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 up today by + 0.99 %The leading sector best performance indices today are Utilities 3.27 % Consumer Disc 2.5 % Telecom 2.09 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.49 %, SABIC have positive performance today by + 1.06 %, STC has a positive performance today by + 2.69 %, Al Rajhi Bank has a positive performance today by + 0.95 %.



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