



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 7th October 2024

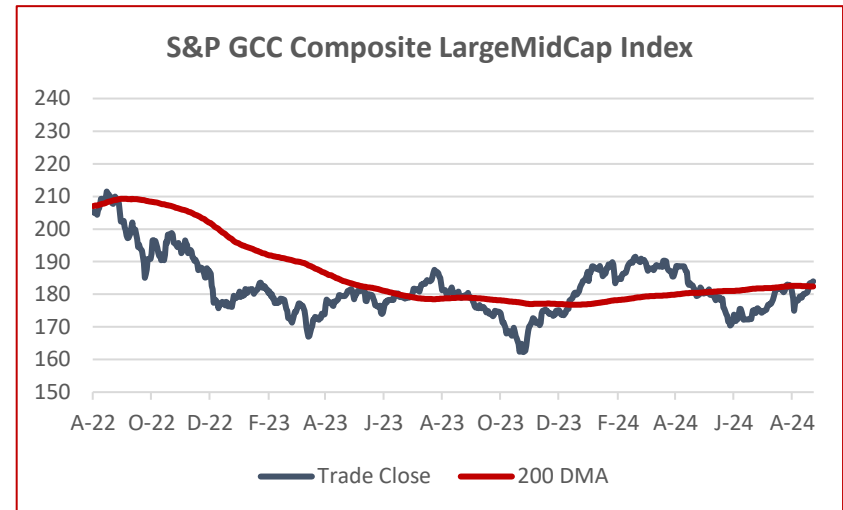




Sunday, October 6, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,769.0	-1.58	-1.58	-3.74	-3.74	-1.66	2.88	21.93	3.51	9,935.61
Qatar (QE Index)	10,412.0	-0.51	-0.51	-1.90	-1.90	-3.87	1.22	11.80	4.31	526.86
Dubai (DFMGI)	4,405.9	0.17	-2.55	-2.17	-2.17	8.52	1.55	8.64	5.44	667.35
Abu Dhabi (ADI)	9,179.8	-0.37	-3.06	-2.61	-2.61	-4.16	2.65	16.68	2.08	2,580.65
Bahrain (BAX)	2,003.6	-0.13	-0.13	-0.46	-0.46	1.63	0.91	10.43	4.56	7.76
Muscat SE INDEX	4,681.1	0.16	0.16	-0.62	-0.62	3.70	0.83	9.91	5.85	7.26
SP GCC Comp LMC	178.5	-1.22	-1.22	-3.81	-3.81	-3.46	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	136.3	0.00	0.00	-3.98	-3.98	-1.11				
Developed Markets										
MSCI World Index	3,698.4	0.61	-0.76	-0.66	-0.66	16.70				
U.S. (S&P 500)	5,751.1	0.90	0.22	-0.20	-0.20	20.57	4.77	27.51	1.55	51,194.78
U.K. (FTSE 100)	8,280.6	-0.02	-0.48	0.53	0.53	7.08	1.75	15.06	3.70	2,153.02
Japan (topix)	2,694.1	0.39	-1.71	1.82	1.82	13.85	1.40	14.66	2.16	948,723.49
Emerging Markets										
MSCI EM Index	1,179.3	0.54	0.41	0.72	0.72	15.20				
China (SSE Composite)	3,336.5	8.06	8.06	17.39	12.44	12.15	1.36	12.00		44,025.04
India (Sensex)	81,688.5	-0.98	-4.54	-3.10	-3.10	13.08	4.37	23.68	1.12	162,419.59
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,965.7	-1.00	-1.00	-2.39	-2.39	2.18	1.44	15.13	3.77	42.35
Kuwait Premier Index	7,500.9	-1.08	-1.08	-2.70	-2.70	0.32	1.55	16.23	3.57	34.66
Kuwait Main Index	6,215.4	-0.63	-0.63	-0.98	-0.98	11.59	1.10	11.27	4.80	7.69
Kuwait Sector										
Banking	1,709.7	-0.73	-0.73	-2.48	-2.48	3.77	1.71	17.05	3.18	25.79
Telecom	1,006.2	-1.16	-1.16	-2.13	-2.13	-8.95	1.49	12.29	8.26	3.11
Industrials	708.1	-1.45	-1.45	-2.42	-2.42	-22.01	0.77	11.15	6.01	2.43
Financial Services	1,355.6	-2.40	-2.40	-3.90	-3.90	11.83	1.14	12.39	2.96	4.65
Real Estate	1,359.6	-1.02	-1.02	-1.16	-1.16	12.09	1.06	15.03	2.07	2.91
Basic Materials	796.4	-0.32	-0.32	-1.35	-1.35	6.76	1.44	13.80	10.96	0.45
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	997.0	-0.99	-0.99	-0.68	-0.68	51.38	2.19	20.76	2.04	0.31
Insurance	2,073.8	-0.36	-0.36	-0.47	-0.47	-9.55	1.13	11.33	3.81	0.84
Consumer Discretionary	1,790.8	-0.46	-0.46	-0.86	-0.86	11.65				
Energy	1,108.8	-0.79	-0.79	-0.79	-0.79	16.83	0.95	9.48	5.67	0.23
Technology	1,069.4	-20.11	-20.11	-26.13	-26.13	84.91	1.55	557.58		0.02
Utilities	384.2	-2.01	-2.01	-1.35	-1.35	-15.61				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices pared gains in early trade on Monday after charting their biggest weekly rise in over a year on Friday amid mounting threats of a region-wide war in the Middle East. Brent crude futures fell 43 cents, or 0.5%, to \$77.62 per barrel.

Kuwait Market

The market down by -1.00% at 6,965.7 value traded 129.7 million KD, Premier market value reached 106.7 million KD down by -1.08% at 7,500.9.

KSA Market

The market closed down by -1.58% at 11,769.0.

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	0.853	-0.70	-0.70	-3.40	-3.40	0.18	1.63	12.78	3.96	7.10
KFH	0.703	-0.42	-0.42	-1.82	-1.82	5.55	2.03	19.62	2.73	12.03
ZAIN	0.462	-1.28	-1.28	-2.74	-2.74	-8.88	1.74	10.79	7.58	2.00
BOUBYAN BANK	0.539	-4.26	-4.26	-5.44	-5.44	-4.78	2.22	27.39	1.40	2.26
AGILITY	0.210	-2.78	-2.78	-4.11	-4.11	-25.85	0.61	6.79	9.52	0.56
Saudi Arabia										
ARAMCO	27.00	-0.18	-0.18	-0.37	-0.37	-18.18	4.33	14.98	7.04	6,534.00
SABIC	72.80	-1.75	-1.75	-2.80	-2.80	-12.81	1.33	113.58	4.53	218.40
STC	42.05	-1.06	-1.06	-3.78	-3.78	6.87	2.74	15.27	3.80	210.25
AL-RAJHI BANK	80.10	-4.76	-4.76	-8.14	-8.14	-7.40	2.75	19.31	3.00	320.40
NCB	33.30	-0.60	-0.60	-2.92	-2.92	-13.84	1.10	10.18	5.41	199.80
Abu Dhabi										
ETISALAT.AD	17.52	-2.45	-6.61	-5.30	-5.30	-10.79	3.47	13.74	4.65	152.37
FAB.AD	12.90	-0.92	-6.52	-6.11	-6.11	-7.59	1.16	8.94	5.50	142.51
EMIRATES NBD	19.95	1.27	-3.86	-1.72	-1.72	15.32	1.08	5.60	6.02	126.02
DB ISLAMIC DB	6.09	-0.49	-4.25	-3.33	-3.33	6.47	0.99	6.67	7.39	44.10
EMAR.DU	8.19	-0.97	-5.86	-6.08	-6.08	3.41	0.94	6.02	6.11	72.39
Qatar										
QNB	16.880	-0.35	-0.35	-0.41	-0.41	2.12	1.43	10.45	3.88	155.91
INDUSTREIS QAT	13.070	0.15	0.15	0.23	0.23	-0.08	2.10	15.17	5.36	79.07
QA ISLAMIC BK	20.950	0.24	0.24	-1.87	-1.87	-2.56	1.67	11.80	2.92	49.50
MASRAF AL RAYA	2.374	-1.08	-1.08	-3.89	-3.89	-10.58	0.90	15.44	4.21	22.08
MESAIEED PETRO	1.606	-1.59	-1.59	-1.47	-1.47	-10.18	1.23	22.52	4.36	20.18
Oman										
BANK MUSCAT	0.251	0.00	0.00	-0.40	-0.40	-4.92	0.80	9.56	6.18	1.88
OMANTEL	0.990	0.92	0.92	0.30	0.30	-6.60	1.20	11.58	6.06	0.74
BANK DHOFAR	0.157	0.00	0.00	0.00	0.00	-1.88	0.65	14.83	4.94	0.47
NAT BANK OF OMAN	0.290	0.00	0.00	0.00	0.00	3.57	0.69	10.06	2.93	0.47
OMINVEST	0.349	-0.29	-0.29	-0.85	-0.85	-11.71	0.77	8.41	5.73	0.23

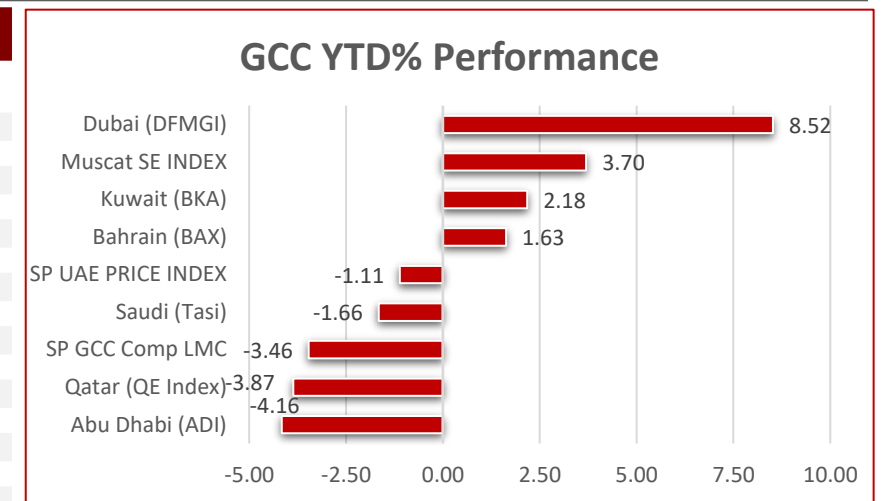
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
25-Sept. 24	24.33%	15.45%	0.06%	3.67%	7.93%	17.59%	13.03%	5.98%	5.79%
02-October. 24	24.76%	15.65%	0.06%	3.74%	7.96%	17.62%	13.06%	6.0%	5.85%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -1 %The leading sector bottom performance indices today are Technology -20.11 % Financial services -2.4 % Utilities -2.01 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have negative performance today by -1.75 % . STC have negative performance today by -1.06 %, Al Rajhi Bank have negative performance today by -4.76 %



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