



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 7th November 2024



DAILY MARKETS WRAP,

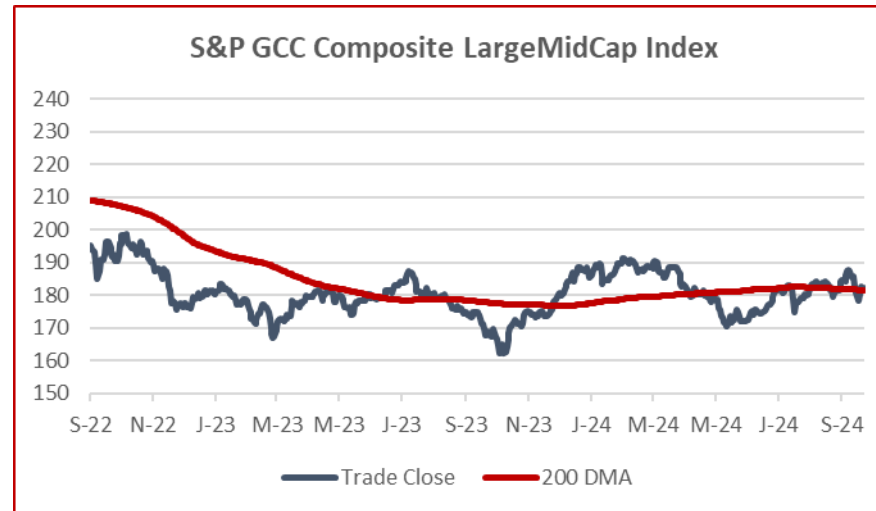
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,093.4	0.65	0.59	0.59	-1.09	1.05	3.04	22.95	3.03	10,157.70
Qatar (QE Index)	10,568.5	0.00	0.42	0.42	-0.43	-2.42	1.24	11.73	4.24	536.40
Dubai (DFMGI)	4,616.3	0.47	-0.11	0.55	2.50	13.71	1.63	9.04	5.18	691.70
Abu Dhabi (ADI)	9,424.9	0.44	0.81	1.04	-0.01	-1.60	2.73	16.72	2.08	2,651.44
Bahrain (BAX)	2,020.2	0.03	0.06	0.06	0.37	2.47	0.92	10.63	4.50	7.83
Muscat SE INDEX	4,714.0	-0.18	-0.75	-0.75	0.08	4.43	0.99	10.48	5.87	7.46
SP GCC Comp LMC	184.6	0.61	0.60	0.80	-0.56	-0.20	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.7	0.44	0.10	0.92	-0.21	2.77				
Developed Markets										
MSCI World Index	3,752.2	1.60	2.52	2.88	0.78	18.39				
U.S. (S&P 500)	5,929.0	2.53	3.50	3.92	2.89	24.30	4.79	27.73	1.55	51,439.64
U.K. (FTSE 100)	8,166.7	-0.07	-0.13	0.70	-0.85	5.60	1.70	15.62	3.74	2,117.13
Japan (topix)	2,715.9	1.94	2.71	0.76	2.64	14.77	1.42	15.03	2.21	954,378.94
Emerging Markets										
MSCI EM Index	1,131.9	-0.64	0.85	1.10	-3.33	10.56				
China (SSE Composite)	3,383.8	-0.09	3.42	3.17	1.42	13.74	1.36	12.00		44,025.04
India (Sensex)	80,378.1	1.13	0.82	1.25	-4.65	11.27	4.29	23.02	1.15	158,273.47

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,192.2	0.60	0.48	0.48	0.78	5.50	1.47	15.18	3.94	43.05
Kuwait Premier Index	7,715.5	0.64	0.58	0.58	0.09	3.19	1.56	16.05	3.80	35.05
Kuwait Main Index	6,527.8	0.41	0.06	0.06	4.00	17.20	1.15	11.99	4.62	8.00
Kuwait Sector										
Banking	1,759.0	0.65	0.73	0.73	0.33	6.77	1.74	16.93	3.13	26.18
Telecom	1,007.8	-0.12	-0.56	-0.56	-1.97	-8.80	1.48	12.20	8.33	3.08
Industrials	699.9	0.36	0.21	0.21	-3.54	-22.91	0.74	10.80	10.13	2.36
Financial Services	1,458.6	1.16	0.63	0.63	3.40	20.33	1.18	12.64	2.84	4.82
Real Estate	1,398.7	0.29	-0.74	-0.74	1.67	15.31	1.07	15.21	2.06	2.96
Basic Materials	845.3	0.64	-0.55	-0.55	4.71	13.33	1.51	12.74	10.43	0.47
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,084.7	-0.28	-0.25	-0.25	8.06	64.70	2.36	22.43	1.89	0.33
Insurance	2,045.8	0.60	-0.97	-0.97	-1.82	-10.77	1.11	11.05	3.90	0.82
Consumer Discretionary	2,037.6	1.17	3.06	3.06	12.81	27.04				
Energy	1,133.0	-0.30	-1.46	-1.46	1.38	19.39	0.97	9.60	5.57	0.23
Technology	1,076.7	-0.67	-0.67	-0.67	-25.63	86.16	1.26	451.52		0.01
Utilities	397.4	-1.95	-2.58	-2.58	2.03	-12.72				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Brent crude oil futures rose above \$75 per barrel on Thursday, as investors continued to assess the potential impact of Donald Trump's election victory on oil markets.

Kuwait Market

The market up by 0.60% at 7,192.2 value traded 95.5 million KD, Premier market value reached 54.0 million KD up by 0.64% at 7,715.5

KSA Market

The market closed up by 0.65% at 12,093.4.

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	0.857	0.12	0.82	0.82	-2.94	0.65	1.61	12.64	3.95	7.16
KFH	0.726	0.69	0.69	0.69	1.40	9.00	2.09	19.79	2.64	12.46
ZAIN	0.458	0.22	0.44	0.44	-3.58	-9.66	1.73	10.70	7.64	1.99
BOUBYAN BANK	0.567	1.80	1.61	1.61	-0.53	0.17	2.29	27.43	1.33	2.39
AGILITY	0.252	1.61	1.20	1.20	15.07	-11.02	0.73	8.15	7.94	0.68
Saudi Arabia										
ARAMCO	27.55	0.00	2.04	2.04	1.66	-16.52	4.48	16.26	6.99	6,667.45
SABIC	72.50	0.00	-0.28	-0.28	-3.20	-13.17	1.33	113.12	4.55	217.51
STC	42.30	-0.35	0.36	0.36	-3.20	7.51	2.76	15.36	3.78	211.51
AL-RAJHI BANK	90.90	2.25	3.30	3.30	4.24	5.09	3.09	20.78	2.64	363.62
NCB	32.65	0.00	-1.51	-1.51	-4.81	-15.52	1.06	9.80	5.51	195.91
Abu Dhabi										
ETISALAT.AD	17.62	-1.56	-0.90	-0.56	-4.76	-10.29	3.55	13.84	4.63	153.23
FAB.AD	13.32	-0.89	-0.60	1.37	-3.06	-4.58	1.14	9.12	5.33	147.15
EMIRATES NBD	19.55	-0.76	1.03	2.89	-3.69	13.01	1.00	5.48	6.14	123.49
DB ISLAMIC DB	6.30	1.61	0.64	0.80	0.00	10.14	0.99	6.53	7.14	45.62
EMAR.DU	8.84	0.91	0.00	1.73	1.38	11.62	1.01	6.50	5.66	78.13
Qatar										
QNB	17.290	-0.06	-0.35	-0.35	2.01	4.60	1.43	10.51	3.79	159.70
INDUSTREIS QAT	13.430	-0.37	0.60	0.60	2.99	2.68	2.20	15.21	5.21	81.25
QA ISLAMIC BK	20.870	0.43	1.80	1.80	-2.25	-2.93	1.63	11.48	2.93	49.31
MASRAF AL RAYA	2.380	0.42	0.34	0.34	-3.64	-10.36	0.89	15.20	4.20	22.13
MESAEED PETRO	1.576	-0.51	-0.38	-0.38	-3.31	-11.86	1.22	24.73	4.44	19.80
Oman										
BANK MUSCAT	0.257	0.00	-0.39	-0.39	1.98	-2.65	0.80	9.59	6.03	1.93
OMANTEL	0.986	0.31	-0.20	-0.20	-0.10	-6.98	1.19	11.53	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	0.28	-2.19	-2.19	1.42	-9.69	0.79	8.61	5.60	0.24

* GCC Markets performance at the latest close.

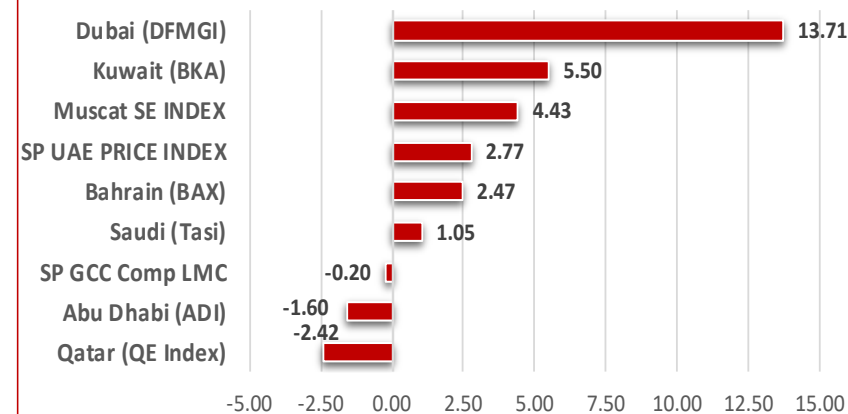
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
30-October. 24	24.69%	15.88%	0.06%	3.69%	7.80%	17.65%	13.08%	6.14%	5.91%
06-Nov. 24	24.64%	16.00%	0.06%	3.72%	8.06%	17.71%	13.09%	6.06%	6.04%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

Kuwait

The market is up today by + 0.6 %The leading sector best performance indices today is consumer Cis. 1.7%.

KSA

Saudi Armco flat performance today 0 %, SABIC flat performance today 0 %, STC have negative performance today by -0.35 %, Al Rajhi Bank has a positive performance today by + 2.25 %.



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