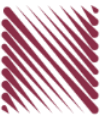


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 8th October 2024

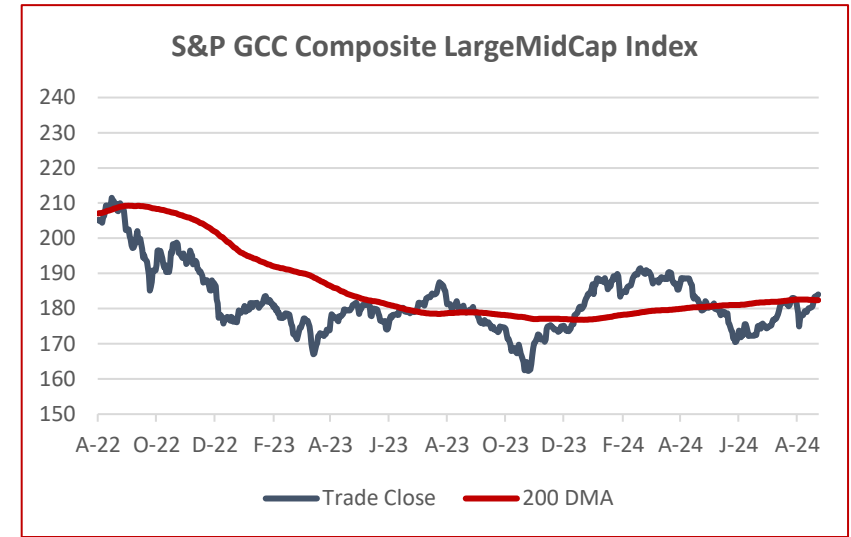




Monday, October 7, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,913.6	1.23	-0.37	-2.56	-2.56	-0.45	2.93	22.33	3.45	9,968.17
Qatar (QE Index)	10,451.3	0.38	-0.13	-1.53	-1.53	-3.50	1.22	11.84	4.29	528.66
Dubai (DFMGI)	4,395.1	-0.25	-0.25	-2.41	-2.41	8.26	1.55	8.65	5.42	666.71
Abu Dhabi (ADI)	9,147.0	-0.36	-0.36	-2.95	-2.95	-4.50	2.64	16.63	2.09	2,575.79
Bahrain (BAX)	2,001.3	-0.11	-0.25	-0.57	-0.57	1.51	0.91	10.42	4.56	7.75
Muscat SE INDEX	4,681.0	0.00	0.16	-0.62	-0.62	3.70	0.83	9.94	5.84	7.28
SP GCC Comp LMC	180.4	1.05	-0.18	-2.79	-2.79	-2.44	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	3,678.8	-0.53	-0.53	-1.19	-1.19	16.08				
U.S. (S&P 500)	5,695.9	-0.96	-0.96	-1.15	-1.15	19.42	4.77	27.51	1.55	51,194.78
U.K. (FTSE 100)	8,303.6	0.28	0.28	0.81	0.81	7.38	1.75	15.11	3.69	2,158.82
Japan (topix)	2,739.4	1.68	1.68	3.53	3.53	15.76	1.43	14.91	2.12	963,666.71
Emerging Markets										
MSCI EM Index	1,183.8	0.38	0.38	1.10	1.10	15.63				
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)	81,050.0	-0.78	-0.78	-3.86	-3.86	12.20	4.33	23.49	1.12	161,219.21
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	6,984.4	0.27	-0.73	-2.13	-2.13	2.45	1.43	14.98	4.04	41.94
Kuwait Premier Index	7,533.3	0.43	-0.65	-2.28	-2.28	0.75	1.53	16.05	3.88	34.29
Kuwait Main Index	6,186.0	-0.47	-1.10	-1.44	-1.44	11.07	1.09	11.22	4.82	7.65
Kuwait Sector										
Banking	1,712.4	0.16	-0.58	-2.33	-2.33	3.94	1.70	16.92	3.20	25.61
Telecom	1,012.1	0.59	-0.57	-1.56	-1.56	-8.42	1.47	12.14	8.35	3.07
Industrials	708.8	0.11	-1.34	-2.31	-2.31	-21.93	0.76	10.99		2.39
Financial Services	1,364.9	0.69	-1.73	-3.24	-3.24	12.60	1.11	12.10	3.03	4.53
Real Estate	1,369.0	0.69	-0.33	-0.48	-0.48	12.87	1.04	14.89	2.09	2.88
Basic Materials	807.4	1.38	1.05	0.01	0.01	8.24	1.43	13.76	11.00	0.45
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	999.4	0.24	-0.75	-0.44	-0.44	51.75	2.16	20.56	2.06	0.30
Insurance	2,075.5	0.08	-0.28	-0.39	-0.39	-9.48	1.13	11.29	3.83	0.84
Consumer Discretionary	1,782.3	-0.47	-0.93	-1.33	-1.33	11.12				
Energy	1,092.9	-1.43	-2.22	-2.21	-2.21	15.16	0.95	9.42	5.71	0.23
Technology	1,149.5	7.48	-14.13	-20.60	-20.60	98.74				
Utilities	384.2	0.00	-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 edged lower in early Asian trading hours on Tuesday as traders booked profits after prices rallied to their highest in over a month on Monday amid fears that the Middle East could be on the brink of a region-wide war. Brent crude futures fell 23 cents, or 0.3%, to \$80.70 per barrel.

Kuwait Market

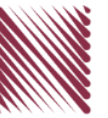
The market up by 0.27% at 6,984.4 value traded 69.6 million KD, Premier market value reached 50.8 million KD up by 0.43% at 7,533.3.

KSA Market

The market closed up by 1.23% at 11,913.6.

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	0.858	0.59	-0.12	-2.83	-2.83	0.77	1.64	12.86	3.94	7.15
KFH	0.705	0.28	-0.14	-1.54	-1.54	5.85	2.04	19.68	2.72	12.07
ZAIN	0.463	0.22	-1.07	-2.53	-2.53	-8.68	1.74	10.82	7.56	2.00
BOUBYAN BANK	0.537	-0.37	-4.62	-5.79	-5.79	-5.13	2.21	27.29	1.41	2.26
AGILITY	0.212	0.95	-1.85	-3.20	-3.20	-25.15	0.62	6.86	9.43	0.57
Saudi Arabia										
ARAMCO	26.95	-0.19	-0.37	-0.55	-0.55	-18.33	4.32	14.96	7.05	6,525.37
SABIC	72.80	0.00	-1.75	-2.80	-2.80	-12.81	1.33	113.58	4.53	218.52
STC	42.25	0.48	-0.59	-3.32	-3.32	7.38	2.76	15.34	3.79	211.36
AL-RAJHI BANK	84.20	5.12	0.12	-3.44	-3.44	-2.66	2.89	20.30	2.85	336.98
NCB	33.95	1.95	1.34	-1.02	-1.02	-12.16	1.13	10.38	5.30	203.81
Abu Dhabi										
ETISALAT.AD	17.56	0.23	0.23	-5.08	-5.08	-10.59	3.48	13.77	4.64	152.72
FAB.AD	12.90	0.00	0.00	-6.11	-6.11	-7.59	1.16	8.94	5.50	142.52
EMIRATES NBD	20.25	1.50	1.50	-0.25	-0.25	17.05	1.10	5.68	5.93	127.91
DB ISLAMIC DB	6.17	1.31	1.31	-2.06	-2.06	7.87	1.01	6.76	7.29	44.68
EMAR.DU	8.16	-0.37	-0.37	-6.42	-6.42	3.03	0.93	6.00	6.13	72.13
Qatar										
QNB	16.900	0.12	-0.24	-0.29	-0.29	2.24	1.43	10.46	3.88	156.10
INDUSTREIS QAT	13.100	0.23	0.38	0.46	0.46	0.15	2.11	15.20	5.34	79.26
QA ISLAMIC BK	20.900	-0.24	0.00	-2.11	-2.11	-2.79	1.66	11.77	2.93	49.39
MASRAF AL RAYA	2.377	0.13	-0.96	-3.77	-3.77	-10.47	0.91	15.46	4.21	22.11
MESAIEED PETRO	1.634	1.74	0.12	0.25	0.25	-8.61	1.25	22.91	4.28	20.53
Oman										
BANK MUSCAT	0.255	1.59	1.59	1.19	1.19	-3.41	0.81	9.71	6.08	1.91
OMANTEL	0.984	-0.61	0.31	-0.30	-0.30	-7.17	1.19	11.51	6.10	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	0.345	-1.15	-1.43	-1.99	-1.99	-12.72	0.76	8.32	5.80	0.23

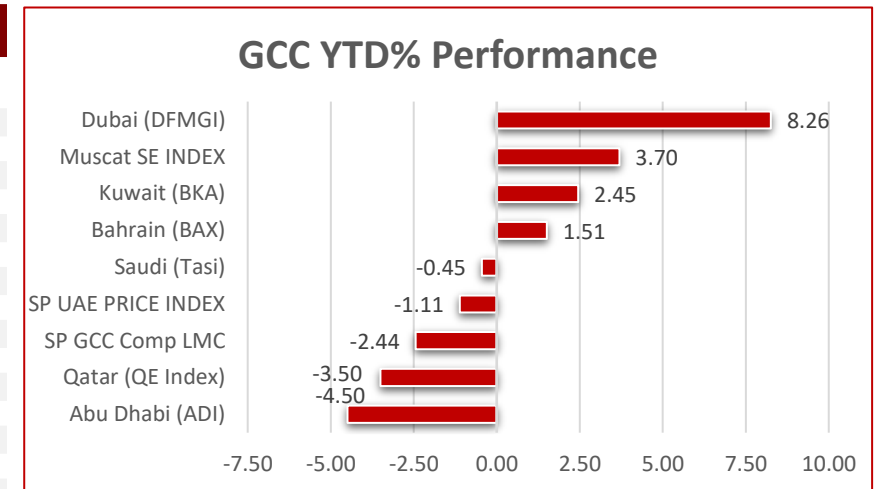
* GCC Markets performance at the latest close.

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 up today by + 0.27 % The leading sector best performance indices today are Technology 7.48 % Basic materials 1.38 % Real estate 0.69 % respectively.

KSA

Saudi Armco have negative performance today by -0.19 %, SABIC flat performance today 0 %. STC has a positive performance today by + 0.48 %, Al Rajhi Bank has a positive performance today by + 5.12 %



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