



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursdays ,8th August 2024

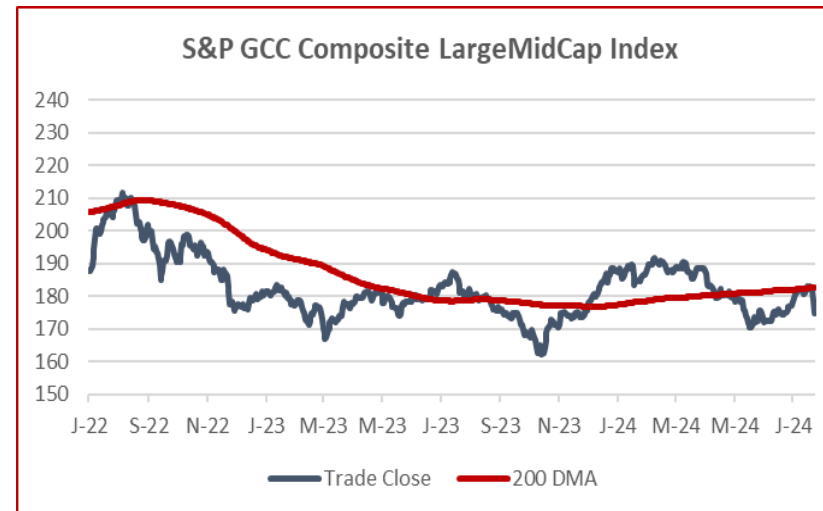




Thursday, August 8, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,667.1	-0.53	-3.14	-3.65	-0.11	-2.51	2.84	21.69	3.36	10,006.36
Qatar (QE Index)	10,053.0	-0.24	-0.77	-1.00	0.86	-7.18	1.17	11.32	4.61	507.36
Dubai (DFMGI)	4,195.2	-0.02	-0.99	-1.71	4.10	3.33	1.46	8.41	5.77	633.77
Abu Dhabi (ADI)	9,305.6	0.55	0.14	-0.36	2.70	-2.84	2.69	16.95	2.08	2,563.20
Bahrain (BAX)	1,910.8	-1.06	-3.05	-3.00	-5.66	-3.08	0.85	10.85	4.70	7.38
Muscat SE INDEX	4,644.9	0.02	-0.48	-0.36	-0.90	2.90	0.83	9.84	5.87	7.23
SP GCC Comp LMC	178.1	-0.04	-2.15	-2.65	1.76	-3.71	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	134.0	-0.15	-0.44	-1.09	4.96	-2.78				
Developed Markets										
MSCI World Index	3,447.8	0.58	-0.03	-3.47	-1.82	8.79				
U.S. (S&P 500)	5,344.2	0.47	-0.04	-3.23	-2.13	12.04	4.41	25.47	1.64	47,298.75
U.K. (FTSE 100)	8,168.1	0.28	-0.08	-2.39	0.05	5.62	1.72	14.77	3.76	2,125.58
Japan (topix)	2,483.3	0.88	-2.14	-11.13	-11.61	4.94	1.30	13.58	2.33	874,627.79
Emerging Markets										
MSCI EM Index	1,063.4	1.64	0.21	-1.97	-2.10	3.88				
China (SSE Composite)	2,862.2	-0.27	-1.48	-2.61	-3.55	-3.79	1.36	12.00		44,025.04
India (Sensex)	79,705.9	1.04	-1.58	-2.49	0.85	10.33	4.40	23.26	1.15	158,148.33
Kuwait										
Kuwait All Share Index	7,065.6	0.11	-2.06	-2.40	1.85	3.64	1.45	15.07	3.67	42.53
Kuwait Premier Index	7,697.0	0.11	-2.14	-2.56	2.03	2.94	1.57	16.43	3.50	35.19
Kuwait Main Index	5,971.0	0.15	-1.66	-1.61	0.99	7.20	1.05	10.41	4.54	7.34
Kuwait Sector										
Banking	1,754.4	0.09	-2.35	-2.77	2.48	6.49	1.74	17.36	3.09	26.27
Telecom	982.6	0.56	-0.58	-0.98	-0.10	-11.09	1.44	11.62	8.55	3.00
Industrials	762.5	-0.49	-2.78	-2.86	-1.31	-16.02	0.81	11.38	5.66	2.58
Financial Services	1,336.2	0.51	-2.01	-2.07	1.90	10.23	1.10	11.69	2.96	4.47
Real Estate	1,308.9	0.06	-1.53	-1.83	1.03	7.91	1.01	14.31	2.09	2.77
Basic Materials	746.9	0.21	-0.82	-0.42	-1.14	0.12	1.34	13.10	11.73	0.42
Health Care	468.0	0.00	0.00	0.00	5.97	-2.93	1.56	14.30	2.24	
Consumer Staples	1,022.3	1.22	5.62	4.04	24.01	55.23	2.22	21.05	2.01	0.31
Insurance	2,317.3	-0.25	-2.14	-2.38	-8.03	1.07	1.26	11.27	3.42	0.94
Consumer Discretionary	1,660.2	0.06	-1.74	-1.97	7.81	3.51				
Energy	1,048.6	-0.05	-1.29	-2.28	1.78	10.49	0.90	9.76	6.30	0.21
Technology	1,549.6	0.00	-4.91	-4.91	-2.29	167.92	1.80	256.63		0.02
Utilities	407.9	-3.13	-3.73	-3.73	-3.13	-10.41				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

U.S. crude oil gained more than 4% this week as recession fears eased and the risk of a wider war in the Middle East that could disrupt production and transportation loomed over the market. Brent October contract: \$79.66 per barrel.

Kuwait Market

The market closed up by +0.11% at 7,065.6 value traded 43.2 million KD, Premier market value reached 33.3 million KD up by +0.11% at 7,697.0.

KSA Market

The market closed down by -0.53% at 11,667.1

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	0.869	1.28	-3.44	-3.98	1.52	2.06	1.66	13.02	3.89	7.26
KFH	0.720	-0.28	-1.91	-2.31	2.13	8.10	2.08	20.09	2.66	12.35
ZAIN	0.453	0.44	0.00	-0.44	1.57	-10.65	1.58	10.30	7.73	1.97
BOUBYAN BANK	0.584	-0.85	-0.34	-1.35	3.55	3.17	2.41	29.67	1.29	2.46
AGILITY	0.265	-0.38	-3.99	-3.28	-5.02	-6.43	0.71	7.78	7.55	0.71
Saudi Arabia										
ARAMCO	27.75	0.00	0.91	0.54	-0.54	-15.91	4.45	15.40	6.85	6,711.74
SABIC	75.00	-1.45	-5.54	-4.82	1.63	-10.18	1.35	196.73	4.40	224.87
STC	38.05	0.40	-0.78	-1.17	-0.13	-3.30	2.48	13.82	4.20	190.14
AL-RAJHI BANK	85.80	1.30	0.94	0.23	7.25	-0.81	2.95	20.69	2.80	343.01
NCB	34.70	0.29	-8.80	-8.68	-4.28	-10.22	1.15	10.71	5.19	208.08
Abu Dhabi										
ETISALAT.AD	17.50	-2.40	1.43	4.27	6.09	-13.03	3.39	13.39	4.77	148.52
FAB.AD	13.10	2.44	2.44	2.91	7.70	-3.87	1.20	9.30	5.29	148.24
EMIRATES NBD	19.35	-0.51	1.57	1.31	17.27	11.85	1.05	5.43	6.20	122.21
DB ISLAMIC DB	5.83	0.00	-1.52	-0.34	1.57	1.92	0.95	6.39	7.72	42.21
EMAR.DU	8.15	-1.09	-2.86	-5.56	-0.61	2.90	0.91	6.35	6.13	72.03
Qatar										
QNB	15.300	0.07	-0.65	0.07	4.44	-7.44	1.30	9.47	4.28	141.30
INDUSTREIS QAT	12.970	0.15	1.01	-0.92	0.70	-0.84	2.15	16.23	6.01	78.46
QA ISLAMIC BK	19.550	-0.51	0.10	-0.76	5.11	-9.07	1.55	11.01	3.13	46.19
MASRAF AL RAYA	2.242	-0.62	-3.24	-3.78	-3.74	-15.56	0.85	14.58	4.46	20.85
MESAIEED PETRO	1.633	-0.79	-2.16	-2.39	-0.73	-8.67	1.27	20.35	5.27	20.51
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.00	0.40	-4.55	0.80	9.60	6.15	1.89
OMANTEL	1.000	0.70	-0.20	0.00	-1.48	-5.66	1.22	11.29	6.00	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	0.335	-1.18	-1.47	-1.47	-5.63	-15.25	0.71	7.28	5.97	0.22

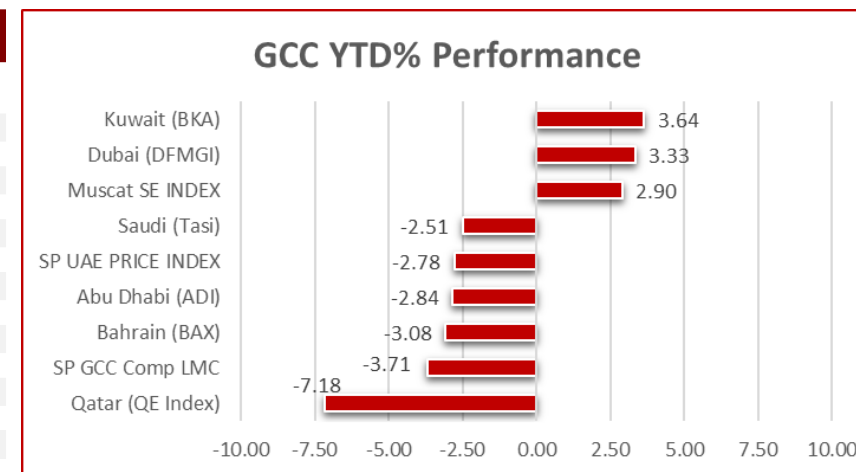
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
31-July-24	24.42%	14.01%	0.06%	2.85%	6.89%	17.59%	12.97%	6.0%	5.66%
07-August 24	24.49%	14.32%	0.06%	3.00%	7.20%	17.59%	12.99%	6.0%	5.66%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is up today by + 0.11 % The leading sector best performance indices today are Consumer services 1.22 % Telecom 0.56 % Financial services 0.51 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -1.4 %, STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a positive performance today by + 1.3 %.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw