

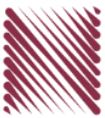


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 8th July 2024

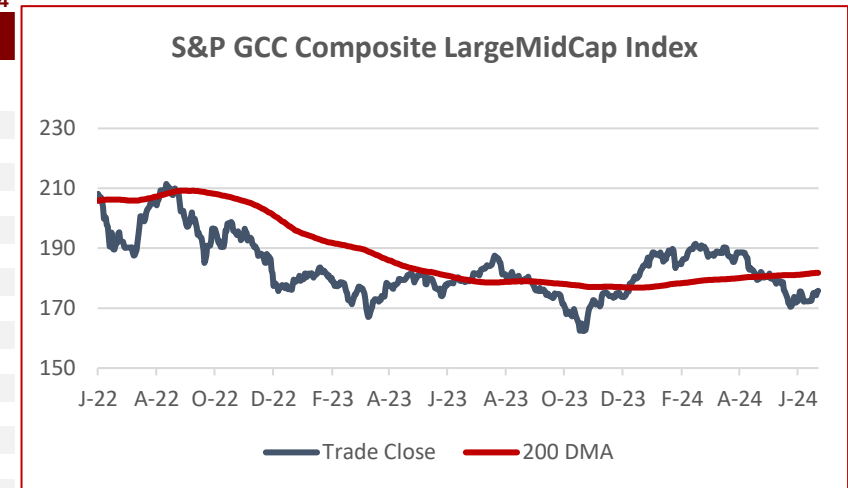




Monday, July 8, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,718.2	0.25	0.51	0.33	0.33	-2.08	2.98	23.57	3.29	10,142.94
Qatar (QE Index)	10,156.9	0.33	0.83	1.90	1.90	-6.22	1.18	11.57	4.66	511.05
Dubai (DFMGI)	4,082.0	0.29	0.29	1.29	1.29	0.55	1.42	8.35	5.91	606.40
Abu Dhabi (ADI)	9,133.3	-0.06	-0.06	0.80	0.80	-4.64	2.64	16.42	2.10	2,546.93
Bahrain (BAX)	2,005.2	0.13	0.13	-1.00	-1.00	1.71	0.86	10.85	4.35	7.88
Muscat SE INDEX	4,687.0	-0.04	-0.04	-0.01	-0.01	3.83	0.83	10.14	5.86	7.26
SP GCC Comp LMC	176.1	0.49	0.64	0.62	0.62	-4.79	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	128.8	0.34	0.34	0.89	0.89	-6.55				
Developed Markets										
MSCI World Index	3,582.7	0.05	0.05	2.02	2.02	13.05				
U.S. (S&P 500)	5,572.9	0.10	0.10	2.06	2.06	16.84	4.63	27.29	1.59	49,441.19
U.K. (FTSE 100)	8,193.5	-0.13	-0.13	0.36	0.36	5.95	1.74	14.74	3.72	2,135.98
Japan (topix)	2,867.6	-0.57	-0.57	2.06	2.06	21.18	1.50	15.88	2.02	1,006,320.92
Emerging Markets										
MSCI EM Index	1,107.3	0.22	0.22	1.94	1.94	8.16				
China (SSE Composite)	2,922.4	-0.93	-0.93	-1.51	-1.51	-1.76	1.36	12.00		44,025.04
India (Sensex)	79,960.4	-0.05	-0.05	1.17	1.17	10.69	5.04	23.77	1.13	157,848.18
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,052.4	0.98	0.98	1.66	1.66	3.45	1.43	14.98	3.67	42.03
Kuwait Premier Index	7,692.0	1.18	1.18	1.97	1.97	2.88	1.55	16.34	3.49	34.76
Kuwait Main Index	5,924.3	0.00	0.00	0.20	0.20	6.37	1.04	10.35	4.58	7.27
Kuwait Sector										
Banking	1,742.8	1.05	1.05	1.80	1.80	5.79	1.71	17.12	3.08	25.83
Telecom	993.5	0.69	0.69	1.00	1.00	-10.11	1.45	11.76	8.52	3.02
Industrials	785.3	0.18	0.18	1.65	1.65	-13.50	0.84	11.69	5.51	2.65
Financial Services	1,341.5	1.65	1.65	2.31	2.31	10.67	1.08	11.86	3.01	4.40
Real Estate	1,332.8	1.37	1.37	2.87	2.87	9.88	1.01	14.13	2.08	2.79
Basic Materials	751.7	-0.10	-0.10	-0.51	-0.51	0.77	1.35	13.19	11.64	0.42
Health Care	441.6	0.00	0.00	0.00	0.00	-8.40	1.48	12.90	1.95	
Consumer Staples	880.2	2.39	2.39	6.78	6.78	33.66	1.87	19.08	2.39	0.26
Insurance	2,358.9	-0.95	-0.95	-6.38	-6.38	2.88	1.30	11.69	3.33	0.96
Consumer Discretionary	1,569.8	0.75	0.75	1.94	1.94	-2.12				
Energy	1,056.3	-0.11	-0.11	2.53	2.53	11.31	0.90	9.82	6.36	0.21
Technology	1,673.3	0.00	0.00	5.50	5.50	189.31	1.94	277.11		0.02
Utilities	434.2	0.61	0.61	3.13	3.13	-4.62				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices settled down about 1% to a one-week low on Monday as Hurricane Beryl shut U.S. refineries and ports along the Gulf of Mexico, and on hopes a possible ceasefire deal in Gaza could reduce worries about global crude supply disruptions. Brent futures fell 79 cents, or 0.9%, to settle at \$85.75 a barrel.

Kuwait Market

The market closed up by + 0.98% at 7,052.4 value traded 48.6 million KD, Premier market value reached 40.4 million KD up by + 1.18% at 7,692.0.

KSA Market

The market closed up by + 0.25% at 11,718.2.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.855	0.59	0.59	-0.12	-0.12	0.42	1.68	12.92	3.90	7.07
KFH	0.722	1.26	1.26	2.41	2.41	8.40	2.11	21.25	2.54	12.10
ZAIN	0.452	0.44	0.44	1.35	1.35	-10.85	1.57	10.27	7.74	1.94
BOUBYAN BANK	0.573	0.53	0.53	1.60	1.60	1.23	2.41	30.58	1.32	2.36
AGILITY	0.282	2.17	2.17	1.08	1.08	-0.43	0.76	8.28	7.09	0.75
Saudi Arabia										
ARAMCO	28.25	0.36	0.18	1.25	1.25	-14.39	4.49	15.58	6.63	6,774.01
SABIC	74.70	0.27	0.95	1.22	1.22	-10.54	1.34	195.94	4.42	221.93
STC	38.50	1.72	1.45	1.05	1.05	-2.15	2.39	14.29	4.16	189.94
AL-RAJHI BANK	80.00	0.63	0.50	0.00	0.00	-7.51	2.96	19.94	2.88	319.91
NCB	35.70	0.28	1.13	-1.52	-1.52	-7.63	1.18	11.02	4.90	216.84
Abu Dhabi										
ETISALAT.AD	15.98	-0.12	-0.12	-0.75	-0.75	-18.64	3.19	13.30	5.01	141.05
FAB.AD	12.48	-0.16	-0.16	0.16	0.16	-10.60	1.15	8.67	5.69	139.19
EMIRATES NBD	16.65	0.91	0.91	0.91	0.91	-3.76	0.97	4.85	7.21	104.53
DB ISLAMIC DB	5.83	-0.17	-0.17	1.57	1.57	1.92	0.99	6.49	7.72	41.63
EMAR.DU	7.98	-0.25	-0.25	-2.68	-2.68	0.76	0.89	6.22	6.27	71.94
Qatar										
QNB	14.940	0.27	0.61	1.98	1.98	-9.62	1.32	9.44	4.35	136.51
INDUSTREIS QAT	13.180	0.30	0.46	2.33	2.33	0.76	2.18	16.49	5.92	78.59
QA ISLAMIC BK	19.670	0.72	1.65	5.75	5.75	-8.51	1.62	11.24	3.69	44.90
MASRAF AL RAYA	2.331	0.17	1.22	0.09	0.09	-12.20	0.90	15.19	4.29	21.21
MESAIEED PETRO	1.691	-0.88	1.08	2.80	2.80	-5.43	1.31	21.08	5.09	20.65
Oman										
BANK MUSCAT	0.25	-0.40	-0.40	-0.40	-0.40	-5.30	0.82	9.75	6.20	1.88
OMANTEL	1.005	-0.89	-0.89	-0.99	-0.99	-5.19	1.23	11.35	5.97	0.76
BANK DHOFAR	0.160	0.00	0.00	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.256	0.00	0.00	1.19	1.19	-8.57	0.62	8.96	3.32	0.41
OMINVEST	0.345	1.47	1.47	-2.82	-2.82	-12.72	0.73	7.50	5.80	0.23

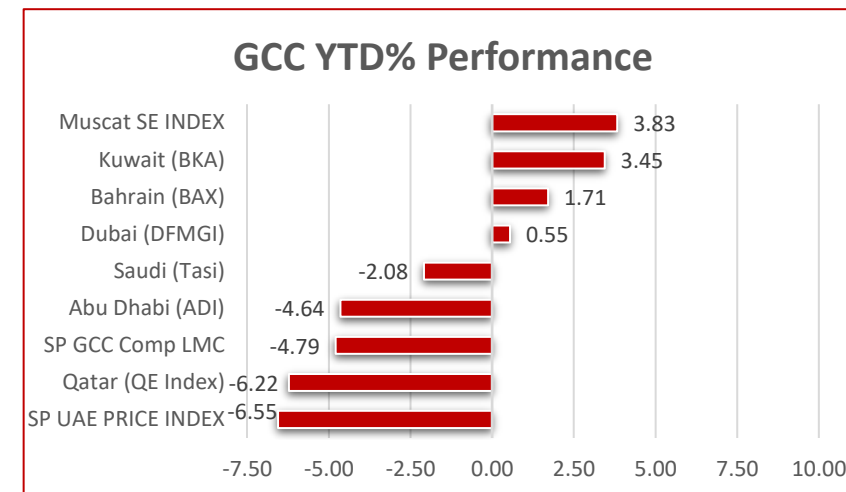
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
26-June-24	24.43%	13.77%	0.06%	2.34%	6.28%	17.66%	13.0%	6.0%	5.60%
03-July-24	24.48%	13.69%	0.06%	2.36%	6.29%	17.67%	12.97%	6.0%	5.60%

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 + 0.98 %The leading sector best performance indices today are Consumer services 2.39 % Financial services 1.65 % Real estate 1.37 % respectively

KSA

Saudi Armco has a positive performance today by + 0.36 %, SABIC have positive performance today by + 0.26%. STC has a positive performance today by + 1.72 %, Al Rajhi Bank has a positive performance today by + 0.63 %



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