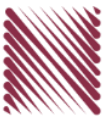


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 8th September 2024



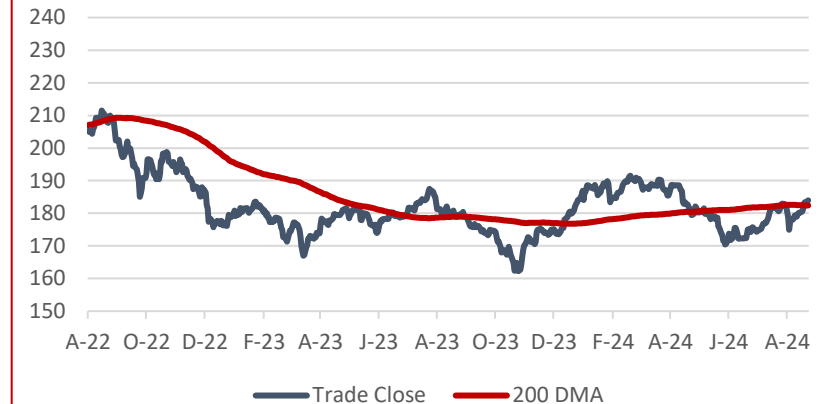


Sunday, September 8, 2024

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,982.3	-0.97	-0.97	-1.34	2.59	0.12	3.04	23.15	3.41	10,031.80
Qatar (QE Index)	10,261.0	-0.60	-0.60	0.57	2.94	-5.26	1.19	11.57	4.37	518.55
Dubai (DFMGI)	4,372.9	0.04	1.10	1.10	8.51	7.71	1.54	8.57	5.50	658.80
Abu Dhabi (ADI)	9,448.1	-0.31	1.76	1.76	4.27	-1.36	2.73	13.50	2.04	2,607.45
Bahrain (BAX)	1,949.5	0.15	0.15	-0.41	-3.75	-1.11	0.87	9.95	4.76	7.53
Muscat SE INDEX	4,772.9	0.25	0.25	0.56	1.83	5.73	0.85	10.13	5.73	7.42
SP GCC Comp LMC	182.2	-0.79	-0.79	-0.59	4.12	-1.48	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.6	0.00	0.00	1.30	9.31	1.25				
Developed Markets										
MSCI World Index	3,518.6	-1.37	-3.90	-3.90	0.19	11.02				
U.S. (S&P 500)	5,408.4	-1.73	-4.25	-4.25	-0.95	13.39	4.48	25.75	1.63	47,874.00
U.K. (FTSE 100)	8,181.5	-0.73	-2.33	-2.33	0.21	5.80	1.74	14.94	3.72	2,127.07
Japan (topix)	2,597.4	-0.89	-4.25	-4.25	-7.55	9.76	1.36	14.14	2.23	917,153.78
Emerging Markets										
MSCI EM Index	1,074.9	-0.11	-2.28	-2.28	-1.05	5.00				
China (SSE Composite)	2,765.8	-0.81	-2.69	-2.69	-6.79	-7.03	1.36	12.00		44,025.04
India (Sensex)	81,183.9	-1.24	-1.43	-1.43	2.72	12.38	4.33	23.55	1.12	162,022.57
Kuwait										
Kuwait All Share Index	7,179.5	-0.10	-0.10	-0.02	3.50	5.31	1.47	15.45	3.69	43.26
Kuwait Premier Index	7,790.3	-0.37	-0.37	-0.41	3.27	4.19	1.60	16.73	3.46	35.75
Kuwait Main Index	6,183.0	1.20	1.20	1.85	4.58	11.01	1.08	10.92	4.88	7.51
Kuwait Sector										
Banking	1,763.6	-0.31	-0.31	-0.85	3.01	7.05	1.76	17.51	3.09	26.48
Telecom	1,018.8	-0.85	-0.85	0.51	3.58	-7.81	1.50	12.40	8.18	3.14
Industrials	763.0	-0.55	-0.55	0.29	-1.24	-15.96	0.82	11.93	5.63	2.60
Financial Services	1,438.3	0.98	0.98	2.85	9.69	18.65	1.17	12.68	2.89	4.76
Real Estate	1,346.7	0.39	0.39	0.23	3.95	11.03	1.03	14.53	2.10	2.84
Basic Materials	802.0	-1.05	-1.05	-1.81	6.15	7.52	1.46	14.00	10.81	0.46
Health Care	456.6	-3.48	-3.48	3.45	3.40	-5.29	1.58	17.89	2.22	
Consumer Staples	999.4	-1.02	-1.02	0.76	21.23	51.75	2.19	20.82	2.04	0.31
Insurance	2,079.5	4.09	4.09	6.01	-17.47	-9.30	1.09	10.84	3.97	0.81
Consumer Discretionary	1,786.1	0.27	0.27	0.71	15.98	11.36				
Energy	1,097.6	0.96	0.96	-0.13	6.54	15.66	0.93	9.36	5.83	0.22
Technology	1,520.5	-8.73	-8.73	-5.00	-4.13	162.89	1.93	693.94		0.02
Utilities	402.6	0.66	0.66	0.00	-4.37	-11.56				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil futures jumped by a dollar in early trading on Monday as a potential hurricane system approached the U.S. Gulf Coast, and as markets recovered from a selloff following weaker-than-expected U.S. jobs data on Friday. Brent crude futures, were up 99 cents, or 1.39%, at \$72.05 a barrel.

Kuwait Market

The market closed down by -0.10% at 7,179.5 value traded 85.3 million KD, Premier market value reached 38.4 million KD down by -0.37% at 7,790.3.

KSA Market

The market closed down by -0.97% at 11,982.3.

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	0.870	-0.46	-0.46	-0.91	1.64	2.18	1.66	13.04	3.89	7.24
KFH	0.721	-0.41	-0.41	-0.83	2.27	8.25	2.08	20.12	2.66	12.33
ZAIN	0.470	-1.05	-1.05	0.64	5.38	-7.30	1.77	10.98	7.45	2.03
BOUBYAN BANK	0.583	-0.85	-0.85	-0.85	3.37	3.00	2.40	29.62	1.29	2.45
AGILITY	0.254	-0.78	-0.78	-0.78	-8.96	-10.32	0.74	8.22	7.87	0.68
Saudi Arabia										
ARAMCO	27.30	-0.91	-0.91	-2.33	-2.15	-17.27	4.38	15.15	6.96	6,606.42
SABIC	73.90	0.14	0.14	-1.20	0.14	-11.50	1.35	115.30	4.47	221.69
STC	42.20	-1.06	-1.06	-1.86	10.76	7.25	2.75	15.32	3.79	210.99
AL-RAJHI BANK	87.00	-1.92	-1.92	-1.25	8.75	0.58	2.99	20.98	2.76	347.99
NCB	34.60	-2.26	-2.26	-1.14	-4.55	-10.48	1.15	10.58	5.20	207.59
Abu Dhabi										
ETISALAT.AD	18.32	-1.40	0.99	0.99	13.79	-6.72	3.63	14.37	4.45	159.32
FAB.AD	13.30	-0.45	-0.75	-0.75	6.74	-4.73	1.19	9.22	5.34	146.93
EMIRATES NBD	20.30	0.25	3.05	3.05	23.03	17.34	1.10	5.70	5.91	128.23
DB ISLAMIC DB	6.14	-0.65	-0.49	-0.49	6.97	7.34	1.00	6.73	7.33	44.46
EMAR.DU	8.71	-0.80	3.20	3.20	6.22	9.97	1.00	6.40	5.74	76.99
Qatar										
QNB	15.700	-1.38	-1.38	-0.88	7.17	-5.02	1.33	9.72	4.17	145.01
INDUSTREIS QAT	12.970	-0.46	-0.46	0.54	0.70	-0.84	2.09	15.05	5.40	78.47
QA ISLAMIC BK	19.840	-0.80	-0.80	1.54	6.67	-7.72	1.58	11.17	3.09	46.88
MASRAF AL RAYA	2.357	-0.51	-0.51	2.48	1.20	-11.22	0.90	15.33	4.24	21.92
MESAEED PETRO	1.647	-1.02	-1.02	-0.18	0.12	-7.89	1.26	23.09	4.25	20.69
Oman										
BANK MUSCAT	0.26	0.00	0.00	0.78	3.59	-1.52	0.83	9.90	5.96	1.95
OMANTEL	1.004	-0.20	-0.20	-0.50	-1.08	-5.28	1.21	11.74	5.98	0.75
BANK DHOFAR	0.158	0.00	0.00	0.00	-4.24	-1.25	0.65	14.92	4.91	0.47
NAT BANK OF OMAN	0.275	1.85	1.85	1.85	8.70	-1.79	0.65	9.54	3.09	0.45
OMINVEST	0.360	2.86	2.86	9.09	1.41	-8.93	0.80	8.68	5.56	0.24

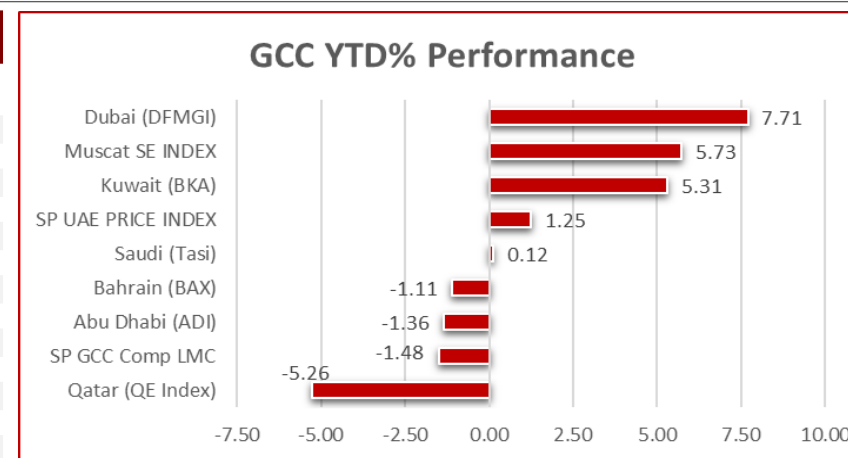
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
28-August 24	24.60%	15.05%	0.06%	3.48%	7.79%	17.58%	12.95%	5.99%	5.72%
04-Sept. 24	24.65%	15.09%	0.06%	3.53%	7.78%	17.58%	12.96%	5.96%	5.62%

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 down today by -0.1 % The leading sector bottom performance indices today are Technology -8.73 % Health care -3.48 % Basic materials -1.05 % respectively

KSA

Saudi Armco have negative performance today by -0.91 %, SABIC have positive performance today by + 0.13%, STC have negative performance today by -1.06 %, Al Rajhi Bank have negative performance today by -1.92 %.



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