



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 9th October 2024





Tuesday, October 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)	12,027.2	0.95	0.58	-1.63	-1.63	0.50	2.92	22.23	3.41	10,025.37
Qatar (QE Index)	10,512.2	0.58	0.45	-0.96	-0.96	-2.94	1.23	11.93	4.26	532.93
Dubai (DFMGI)	4,429.0	0.77	0.53	-1.65	-1.65	9.09	1.56	8.73	5.38	672.44
Abu Dhabi (ADI)	9,258.7	1.22	0.86	-1.77	-1.77	-3.33	2.67	16.83	2.07	2,603.17
Bahrain (BAX)	1,999.2	-0.11	-0.35	-0.67	-0.67	1.41	0.91	10.40	4.57	7.74
Muscat SE INDEX	4,686.8	0.12	0.28	-0.50	-0.50	3.83	0.83	9.95	5.83	7.29
SP GCC Comp LMC	182.7	1.25	1.07	-1.57	-1.57	-1.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.8	1.80	1.79	-2.26	-2.26	0.67				
Developed Markets										
MSCI World Index	3,694.3	0.42	-0.11	-0.77	-0.77	16.57				
U.S. (S&P 500)	5,751.1	0.97	0.00	-0.20	-0.20	20.57	4.72	27.24	1.56	50,693.43
U.K. (FTSE 100)	8,190.6	-1.36	-1.09	-0.56	-0.56	5.91	1.73	14.92	3.74	2,128.97
Japan (topix)	2,699.2	-1.47	0.19	2.01	2.01	14.06	1.41	14.69	2.15	949,939.92
Emerging Markets										
MSCI EM Index	1,156.2	-2.33	-1.96	-1.25	-1.25	12.94				
China (SSE Composite)	3,489.8	4.59	4.59	4.59	4.59	17.31	1.36	12.00		44,025.04
India (Sensex)	81,634.8	0.72	-0.07	-3.16	-3.16	13.00	4.36	23.68	1.12	162,116.71
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,035.7	0.73	0.00	-1.41	-1.41	3.20	1.43	15.00	4.03	42.04
Kuwait Premier Index	7,570.8	0.50	-0.16	-1.79	-1.79	1.25	1.54	16.09	3.87	34.44
Kuwait Main Index	6,298.8	1.82	0.71	0.35	0.35	13.09	1.09	11.18	4.86	7.61
Kuwait Sector										
Banking	1,725.9	0.79	0.21	-1.56	-1.56	4.76	1.70	16.95	3.20	25.64
Telecom	1,009.4	-0.26	-0.84	-1.82	-1.82	-8.66	1.48	12.22	8.30	3.09
Industrials	711.4	0.36	-0.98	-1.95	-1.95	-21.64	0.76	11.01	9.97	2.40
Financial Services	1,386.9	1.61	-0.16	-1.69	-1.69	14.41	1.12	12.21	3.02	4.56
Real Estate	1,380.9	0.87	0.53	0.38	0.38	13.85	1.05	14.99	2.07	2.90
Basic Materials	811.1	0.45	1.51	0.47	0.47	8.73	1.45	12.25	10.85	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,004.2	0.48	-0.28	0.03	0.03	52.47	2.17	20.61	2.06	0.30
Insurance	2,087.4	0.57	0.29	0.18	0.18	-8.96	1.13	11.30	3.82	0.84
Consumer Discretionary	1,775.0	-0.41	-1.34	-1.73	-1.73	10.67				
Energy	1,104.7	1.08	-1.16	-1.15	-1.15	16.41	0.93	9.27	5.80	0.22
Technology	1,164.0	1.27	-13.04	-19.60	-19.60	101.26	1.33	478.79		0.02
Utilities	392.1	2.06	0.00	0.68	0.68	-13.87				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices steadied in Asian trading on Wednesday, as traders weighed uncertainty surrounding developments in the Middle East conflict against continued bearish fundamentals. Brent crude futures rose 11 cents, or 0.14%, to \$77.29 a barrel.

Kuwait Market

The market up by 0.73% at 7,035.7 value traded 62.5 million KD, Premier market value reached 32.8 million KD up by 0.50% at 7,570.8.

KSA Market

The market closed up by 0.95% at 12,027.2.

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	0.865	0.82	0.70	-2.04	-2.04	1.59	1.65	12.96	3.91	7.22
KFH	0.709	0.57	0.42	-0.98	-0.98	6.45	2.05	19.79	2.70	12.16
ZAIN	0.462	-0.22	-1.28	-2.74	-2.74	-8.88	1.74	10.79	7.58	2.00
BOUBYAN BANK	0.540	0.56	-4.09	-5.26	-5.26	-4.60	2.23	27.44	1.40	2.27
AGILITY	0.216	1.89	0.00	-1.37	-1.37	-23.73	0.63	6.99	9.26	0.58
Saudi Arabia										
ARAMCO	27.05	0.37	0.00	-0.18	-0.18	-18.03	4.34	15.01	7.02	6,543.14
SABIC	73.90	1.51	-0.27	-1.34	-1.34	-11.50	1.35	115.30	4.47	221.60
STC	42.35	0.24	-0.35	-3.09	-3.09	7.63	2.76	15.38	3.78	211.65
AL-RAJHI BANK	85.70	1.78	1.90	-1.72	-1.72	-0.92	2.95	20.66	2.80	342.64
NCB	34.90	2.80	4.18	1.75	1.75	-9.70	1.16	10.67	5.16	209.31
Abu Dhabi										
ETISALAT.AD	18.04	2.73	2.97	-2.49	-2.49	-8.15	3.58	14.15	4.52	156.89
FAB.AD	13.32	3.26	3.26	-3.06	-3.06	-4.58	1.19	9.23	5.33	147.15
EMIRATES NBD	20.20	-0.25	1.25	-0.49	-0.49	16.76	1.10	5.67	5.94	127.59
DB ISLAMIC DB	6.14	-0.49	0.82	-2.54	-2.54	7.34	1.00	6.73	7.33	44.46
EMAR.DU	8.46	3.68	3.30	-2.98	-2.98	6.82	0.97	6.22	5.91	74.77
Qatar										
QNB	17.220	1.89	1.65	1.59	1.59	4.17	1.46	10.66	3.80	159.09
INDUSTREIS QAT	13.030	-0.53	-0.15	-0.08	-0.08	-0.38	2.10	15.12	5.37	78.85
QA ISLAMIC BK	20.800	-0.48	-0.48	-2.58	-2.58	-3.26	1.65	11.71	2.94	49.16
MASRAF AL RAYA	2.385	0.34	-0.63	-3.44	-3.44	-10.17	0.91	15.51	4.19	22.19
MESAIEED PETRO	1.652	1.10	1.23	1.35	1.35	-7.61	1.27	23.16	4.24	20.76
Oman										
BANK MUSCAT	0.255	0.00	1.59	1.19	1.19	-3.41	0.81	9.71	6.08	1.91
OMANTEL	0.983	-0.10	0.20	-0.41	-0.41	-7.26	1.19	11.50	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	0.00	-1.43	-1.99	-1.99	-12.72	0.76	8.32	5.80	0.23

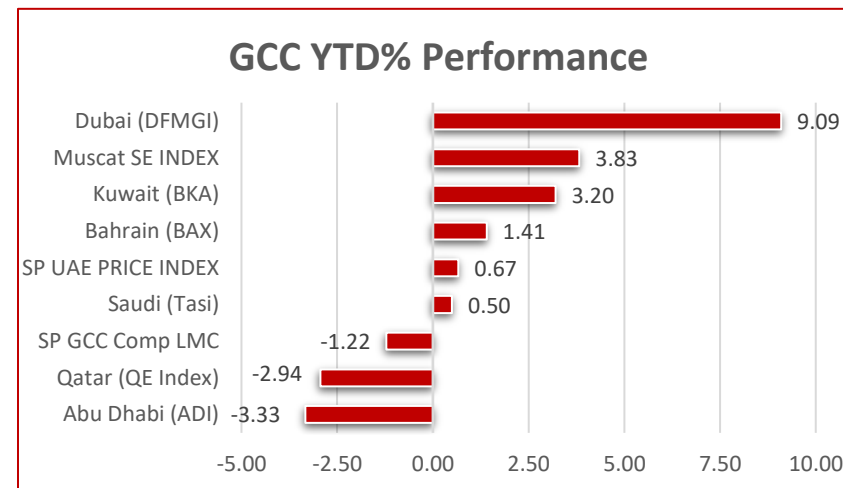
* GCC Markets performance at the latest close.

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

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.

Kuwait

The market is up today by + 0.73 %The leading sector best performance indices today are Utilities 2.06 % Financial services 1.61 % Technology 1.27% respectively.

KSA

Saudi Armco has a positive performance today by + 0.37 %, SABIC have positive performance today by + 1.51%. STC has a positive performance today by + 0.24 %, Al Rajhi Bank has a positive performance today by + 1.78 %



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