

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 9th September 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,962.9	-0.16	-1.13	-1.50	2.43	-0.04	3.03	23.10	3.41	10,012.45
Qatar (QE Index)	10,215.6	-0.44	-1.04	0.12	2.49	-5.68	1.19	11.52	4.39	516.17
Dubai (DFMGI)	4,359.1	-0.31	-0.31	0.78	8.17	7.37	1.53	8.52	5.53	656.54
Abu Dhabi (ADI)	9,355.3	-0.98	-0.98	0.76	3.25	-2.32	2.70	13.37	2.06	2,581.19
Bahrain (BAX)	1,938.0	-0.59	-0.44	-1.00	-4.32	-1.70	0.87	9.91	4.78	7.49
Muscat SE INDEX	4,745.0	-0.58	-0.33	-0.03	1.23	5.12	0.84	10.07	5.76	7.38
SP GCC Comp LMC	181.5	-0.38	-1.17	-0.97	3.72	-1.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	137.8	-1.27	-1.27	0.01	7.92	-0.04				

Developed Markets										
MSCI World Index	3,546.4	0.79	0.79	-3.14	0.99	11.90				
U.S. (S&P 500)	5,471.1	1.16	1.16	-3.14	0.19	14.70	4.48	25.75	1.63	47,874.00
U.K. (FTSE 100)	8,270.8	1.09	1.09	-1.26	1.31	6.95	1.76	15.10	3.69	2,149.66
Japan (topix)	2,579.7	-0.68	-0.68	-4.90	-8.18	9.02	1.35	14.04	2.25	911,354.09
Emerging Markets										
MSCI EM Index	1,063.4	-1.07	-1.07	-3.32	-2.10	3.88				
China (SSE Composite)	2,736.5	-1.06	-1.06	-3.72	-7.78	-8.02	1.36	12.00		44,025.04
India (Sensex)	81,559.5	0.46	0.46	-0.98	3.20	12.90	4.36	23.66	1.12	162,555.97

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,181.5	0.03	-0.07	0.01	3.53	5.34	1.47	15.42	3.69	43.21
Kuwait Premier Index	7,788.6	-0.02	-0.39	-0.43	3.25	4.17	1.59	16.67	3.48	35.62
Kuwait Main Index	6,199.5	0.27	1.47	2.12	4.86	11.31	1.09	11.02	4.82	7.60
Kuwait Sector										
Banking	1,765.6	0.11	-0.19	-0.74	3.12	7.17	1.75	17.45	3.10	26.40
Telecom	1,011.7	-0.70	-1.55	-0.19	2.85	-8.46	1.49	12.30	8.25	3.11
Industrials	763.9	0.11	-0.44	0.40	-1.14	-15.87	0.81	11.86	5.66	2.58
Financial Services	1,445.7	0.51	1.50	3.38	10.25	19.26	1.18	12.79	2.87	4.81
Real Estate	1,343.9	-0.21	0.18	0.02	3.73	10.80	1.03	14.50	2.10	2.85
Basic Materials	799.9	-0.26	-1.31	-2.07	5.87	7.23	1.44	13.86	10.92	0.45
Health Care	441.4	-3.33	-6.70	0.00	-0.05	-8.45	1.53	17.27	2.30	
Consumer Staples	991.2	-0.82	-1.83	-0.07	20.23	50.50	2.17	20.61	2.06	0.30
Insurance	2,070.8	-0.42	3.65	5.56	-17.82	-9.68	1.13	11.31	3.82	0.84
Consumer Discretionary	1,781.2	-0.28	-0.01	0.44	15.66	11.05				
Energy	1,107.0	0.86	1.83	0.72	7.45	16.65	0.94	9.44	5.77	0.22
Technology	1,600.5	5.26	-3.93	0.00	0.92	176.73	1.76	633.33		0.02
Utilities	400.0	-0.65	0.00	-0.65	-5.00	-12.14				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil was steady in early trade on Tuesday as investors weighed supply disruptions from Tropical Storm Francine and the potential for further output cuts against persistently weak Chinese demand. Brent crude futures rose 16 cents, or 0.22%, to \$72.00 a barrel .

Kuwait Market

The market closed up by +0.03% at 7,181.5 value traded 85.1 million KD, Premier market value reached 35.4 million KD down by -0.02% at 7,788.6.

KSA Market

The market closed down by -0.16% at 11,962.9.

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	0.874	0.46	0.00	-0.46	2.10	2.65	1.67	13.10	3.87	7.28
KFH	0.721	0.00	-0.41	-0.83	2.27	8.25	2.08	20.12	2.66	12.34
ZAIN	0.466	-0.85	-1.89	-0.21	4.48	-8.09	1.76	10.89	7.51	2.02
BOUBYAN BANK	0.582	-0.17	-1.02	-1.02	3.19	2.82	2.40	29.57	1.30	2.45
AGILITY	0.251	-1.18	-1.95	-1.95	-10.04	-11.38	0.73	8.12	7.97	0.67
Saudi Arabia										
ARAMCO	27.25	-0.18	-1.09	-2.50	-2.33	-17.42	4.37	15.12	6.97	6,593.62
SABIC	73.70	-0.27	-0.14	-1.47	-0.14	-11.74	1.35	114.99	4.48	221.07
STC	42.50	0.71	-0.35	-1.16	11.55	8.01	2.77	15.43	3.76	212.47
AL-RAJHI BANK	87.90	1.03	-0.90	-0.23	9.88	1.62	3.02	21.19	2.73	351.55
NCB	34.40	-0.58	-2.82	-1.71	-5.10	-11.00	1.14	10.52	5.23	206.37
Abu Dhabi										
ETISALAT.AD	17.92	-2.18	-2.18	-1.21	11.30	-8.76	3.55	14.05	4.55	155.84
FAB.AD	13.28	-0.15	-0.15	-0.90	6.58	-4.87	1.19	9.20	5.35	146.70
EMIRATES NBD	19.90	-1.97	-1.97	1.02	20.61	15.03	1.08	5.58	6.03	125.69
DB ISLAMIC DB	6.16	0.33	0.33	-0.16	7.32	7.69	1.01	6.75	7.31	44.60
EMAR.DU	8.50	-2.41	-2.41	0.71	3.66	7.32	0.97	6.25	5.88	75.13
Qatar										
QNB	15.600	-0.64	-2.01	-1.52	6.48	-5.63	1.32	9.66	4.20	144.09
INDUSTREIS QAT	12.870	-0.77	-1.23	-0.23	-0.08	-1.61	2.07	14.94	5.44	77.86
QA ISLAMIC BK	19.750	-0.45	-1.25	1.07	6.18	-8.14	1.57	11.12	3.10	46.67
MASRAF AL RAYA	2.350	-0.30	-0.80	2.17	0.90	-11.49	0.90	15.28	4.26	21.86
MESAEED PETRO	1.641	-0.36	-1.38	-0.55	-0.24	-8.22	1.26	23.01	4.27	20.62
Oman										
BANK MUSCAT	0.259	-0.38	-0.38	0.39	3.19	-1.89	0.83	9.86	5.98	1.94
OMANTEL	1.004	0.00	-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	0.00	1.85	1.85	8.70	-1.79	0.65	9.54	3.09	0.45
OMINVEST	0.368	2.22	5.14	11.52	3.66	-6.90	0.81	8.87	5.43	0.25

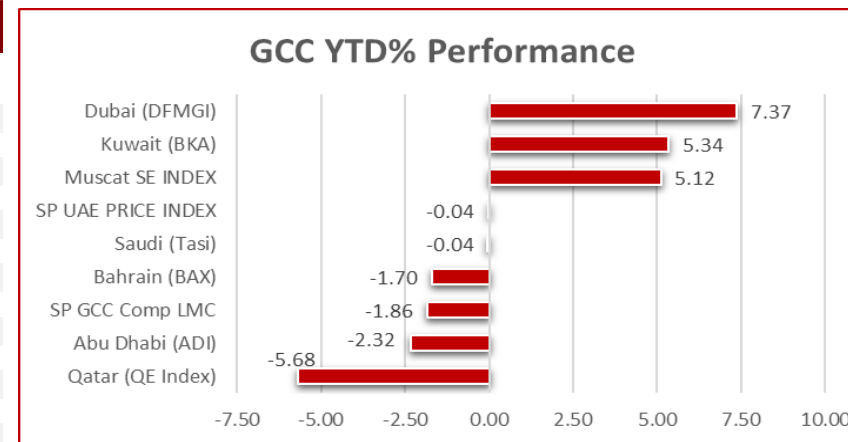
* GCC Markets performance at the latest close.

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

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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 + 0.03 %The leading sector best performance indices today are Technology 5.26 % Energy 0.86 % Financial services 0.51 % respectively.

KSA

Saudi Armco have negative performance today by -0.18 %, SABIC have negative performance today by -0.27%, STC has a positive performance today by + 0.71 %, Al Rajhi Bank has a positive performance today by + 1.03 %.



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