

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

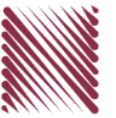
GCC DAILY MORNING BRIEF

Tuesday, 12th November 2024



DAILY MARKETS WRAP,

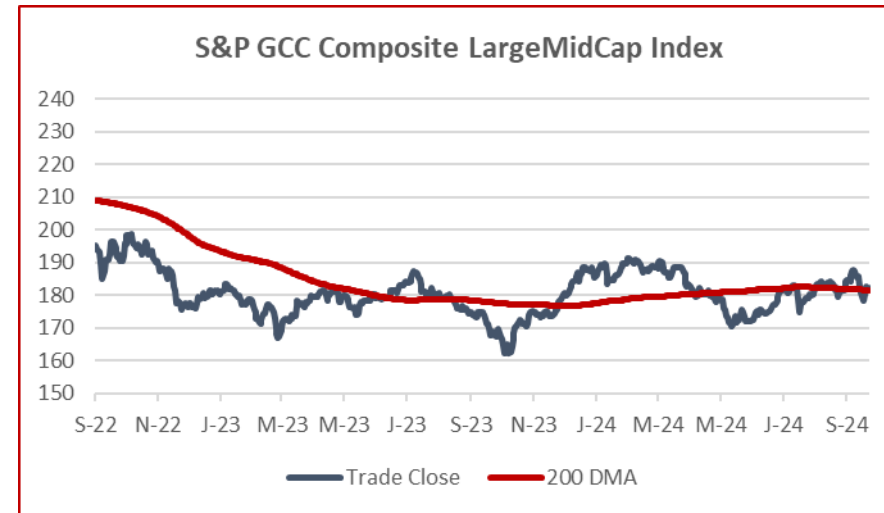
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,106.4	0.03	-0.20	0.70	-0.98	1.16	3.08	23.66	2.98	10,245.09
Qatar (QE Index)	10,605.1	-0.17	0.35	0.77	-0.08	-2.08	1.24	11.77	4.22	538.05
Dubai (DFMGI)	4,652.4	0.27	0.27	1.34	3.31	14.60	1.64	9.13	5.13	695.13
Abu Dhabi (ADI)	9,435.9	-0.14	-0.14	1.16	0.11	-1.48	2.74	16.82	2.07	2,671.43
Bahrain (BAX)	2,027.3	0.01	-0.17	0.41	0.72	2.83	0.92	10.78	4.48	7.85
Muscat SE INDEX	4,683.0	-0.66	-0.48	-1.40	-0.58	3.74	0.85	9.84	5.84	7.41
SP GCC Comp LMC	185.6	0.22	0.29	1.39	0.02	0.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.6	0.36	0.36	1.61	0.48	3.48				
Developed Markets										
MSCI World Index	3,795.3	0.11	0.11	4.06	1.94	19.76				
U.S. (S&P 500)	6,001.4	0.10	0.10	5.19	4.15	25.82	4.96	28.90	1.50	53,336.04
U.K. (FTSE 100)	8,125.2	0.65	0.65	0.19	-1.36	5.07	1.69	15.54	3.75	2,105.35
Japan (topix)	2,739.7	-0.09	-0.09	1.64	3.54	15.77	1.43	15.19	2.22	961,663.37
Emerging Markets										
MSCI EM Index	1,125.9	-0.86	-0.86	0.57	-3.84	9.98				
China (SSE Composite)	3,470.1	0.51	0.51	5.80	4.00	16.64	1.36	12.00		44,025.04
India (Sensex)	79,496.2	0.01	0.01	0.13	-5.70	10.04	4.23	22.85	1.16	156,367.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,267.4	0.53	1.17	1.53	1.84	6.60	1.48	15.28	3.90	43.54
Kuwait Premier Index	7,784.8	0.65	1.06	1.48	0.99	4.12	1.58	16.10	3.77	35.37
Kuwait Main Index	6,639.6	0.01	1.61	1.78	5.78	19.21	1.17	12.27	4.54	8.17
Kuwait Sector										
Banking	1,773.5	0.52	1.01	1.56	1.16	7.65	1.75	17.09	3.10	26.43
Telecom	1,014.4	0.92	0.76	0.08	-1.34	-8.21	1.47	12.15	8.36	3.07
Industrials	721.9	1.74	2.70	3.36	-0.51	-20.49	0.76	11.07	9.96	2.41
Financial Services	1,486.5	0.98	1.63	2.55	5.38	22.63	1.21	12.54	2.78	4.92
Real Estate	1,410.8	0.52	1.11	0.12	2.56	16.32	1.08	15.26	2.05	2.98
Basic Materials	846.0	0.36	0.27	-0.47	4.80	13.42	1.52	12.79	10.39	0.48
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,037.8	-3.63	-3.84	-4.57	3.38	57.58	2.34	22.20	1.91	0.33
Insurance	1,991.0	-2.31	-0.82	-3.63	-4.45	-13.16	1.11	11.09	3.89	0.82
Consumer Discretionary	2,124.6	-0.81	4.01	7.46	17.63	32.47				
Energy	1,130.9	0.43	1.09	-1.64	1.19	19.17	0.96	9.52	5.63	0.23
Technology	1,105.8	2.70	3.40	2.01	-23.62	91.20	1.25	448.48		0.01
Utilities	394.7	0.00	-0.66	-3.22	1.35	-13.29				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell on Monday, after China's stimulus plan disappointed investors seeking fuel demand growth in the world's No. 2 oil consumer and as the U.S. dollar edged higher. Brent crude futures fell \$2.09, or 2.83% to \$71.78 a barrel by 11:08 a.m. ET, while U.S. West Texas Intermediate crude futures were at \$68.17 a barrel, down \$2.21, or 3.14%.

Kuwait Market

The market closed by 0.53% at 7,267.4 value traded 114 million KD, Premier market value reached 55.7 million KD up by 0.65% at 7,784.8

KSA Market

The market closed by 0.03% at 12,106.4.

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	0.860	0.12	0.35	1.18	-2.60	1.01	1.62	12.68	3.93	7.17
KFH	0.737	0.96	1.66	2.22	2.93	10.65	2.12	20.09	2.60	12.63
ZAIN	0.464	1.09	1.31	1.75	-2.32	-8.48	1.75	10.84	7.54	2.01
BOUBYAN BANK	0.566	0.53	1.07	1.43	-0.70	-0.01	2.29	27.38	1.33	2.38
AGILITY	0.281	6.04	9.77	12.85	28.31	-0.78	0.82	9.09	7.12	0.75
Saudi Arabia										
ARAMCO	28.05	0.00	0.18	3.89	3.51	-15.00	4.56	16.55	6.87	6,789.00
SABIC	71.80	-0.28	-0.69	-1.24	-4.14	-14.01	1.31	112.02	4.60	215.43
STC	41.95	-0.83	-0.47	-0.47	-4.00	6.62	2.74	15.23	3.81	209.78
AL-RAJHI BANK	94.40	0.64	1.83	7.27	8.26	9.13	3.21	21.58	2.54	377.65
NCB	33.75	2.43	3.37	1.81	-1.60	-12.68	1.10	10.13	5.33	202.53
Abu Dhabi										
ETISALAT.AD	17.68	0.23	0.23	-0.23	-4.43	-9.98	3.56	13.89	4.61	153.75
FAB.AD	13.32	0.15	0.15	1.37	-3.06	-4.58	1.14	9.12	5.33	147.15
EMIRATES NBD	19.40	1.04	1.04	2.11	-4.43	12.14	0.99	5.44	6.19	122.54
DB ISLAMIC DB	6.38	0.31	0.31	2.08	1.27	11.54	1.00	6.61	7.05	46.19
EMAR.DU	8.94	1.25	1.25	2.88	2.52	12.88	1.02	6.57	5.59	79.01
Qatar										
QNB	17.400	0.29	0.64	0.29	2.65	5.26	1.44	10.57	3.76	160.62
INDUSTREIS QAT	13.440	-0.37	0.07	0.67	3.07	2.75	2.20	15.22	5.21	81.27
QA ISLAMIC BK	21.150	0.24	1.34	3.17	-0.94	-1.63	1.65	11.63	2.90	49.95
MASRAF AL RAYA	2.391	-0.33	0.46	0.80	-3.20	-9.94	0.89	15.27	4.18	22.22
MESAEED PETRO	1.568	-0.44	-0.51	-0.88	-3.80	-12.30	1.21	24.61	4.46	19.69
Oman										
BANK MUSCAT	0.256	-0.39	-0.39	-0.78	1.59	-3.03	0.80	9.55	6.05	1.92
OMANTEL	0.979	-0.31	-0.20	-0.91	-0.81	-7.64	1.18	11.45	6.13	0.73
BANK DHOFAR	0.177	0.00	0.00	0.00	12.74	10.63	0.72	19.84	4.38	0.53
NAT BANK OF OMAN	0.299	0.00	0.00	-0.33	3.10	6.79	0.69	10.20	2.84	0.49
OMINVEST	0.350	-1.96	-1.96	-4.11	-0.57	-11.46	0.77	8.44	5.71	0.23

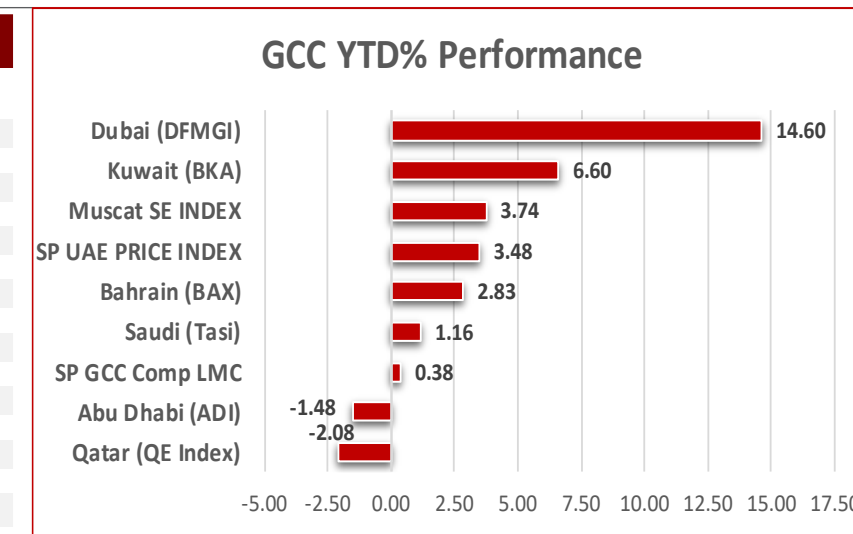
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
30-October. 24	24.69%	15.88%	0.06%	3.69%	7.80%	17.65%	13.08%	6.14%	5.91%
06-Nov. 24	24.64%	16.00%	0.06%	3.72%	8.06%	17.71%	13.09%	6.06%	6.04%

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 + 0.63 %The leading sector best performance indices today is Technology by 2.7%

KSA

Saudi Armco has a Stable performance today, SABIC have negative performance today by -0.28%, STC has a negative performance today by - 0.83 %, Al Rajhi Bank has a positive performance today by + 0.64 %



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