



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 18th November 2024



DAILY MARKETS WRAP,

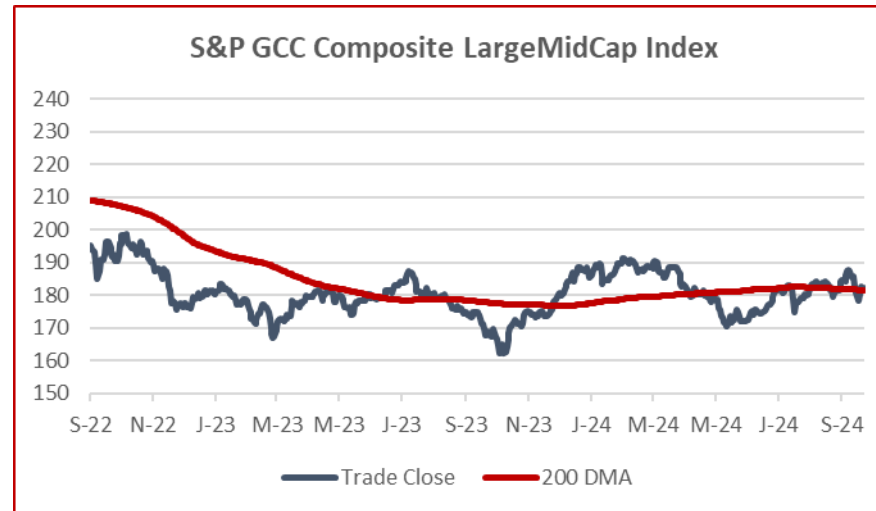
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,812.0	0.18	0.18	-1.75	-3.39	-1.30	2.96	22.85	3.10	10,075.78
Qatar (QE Index)	10,410.7	-0.42	-0.42	-1.08	-1.92	-3.88	1.22	11.54	4.31	526.69
Dubai (DFMGI)	4,739.8	0.22	2.15	3.24	5.25	16.75	1.67	9.33	5.02	706.82
Abu Dhabi (ADI)	9,443.1	0.46	-0.06	1.24	0.19	-1.41	2.74	16.85	2.07	2,668.25
Bahrain (BAX)	2,053.0	0.03	0.03	1.69	2.00	4.14	0.94	10.10	4.41	7.95
Muscat SE INDEX	4,625.9	-0.38	-0.38	-2.60	-1.79	2.48	0.84	9.69	5.91	7.33
SP GCC Comp LMC	182.6	0.08	0.08	-0.26	-1.60	-1.25	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.9	0.00	0.00	1.77	0.63	3.64				
Developed Markets										
MSCI World Index	3,710.5	-1.12	-2.13	1.74	-0.34	17.08				
U.S. (S&P 500)	5,870.6	-1.32	-2.08	2.89	1.88	23.08	4.85	27.81	1.54	52,218.10
U.K. (FTSE 100)	8,063.6	-0.09	-0.11	-0.57	-2.10	4.27	1.66	15.30	3.76	2,087.17
Japan (topix)	2,711.6	0.39	-1.11	0.60	2.48	14.59	1.42	14.41	2.29	951,767.88
Emerging Markets										
MSCI EM Index	1,085.0	0.05	-4.46	-3.08	-7.33	5.98				
China (SSE Composite)	3,330.7	-1.45	-3.52	1.55	-0.17	11.96	1.36	12.00		44,025.04
India (Sensex)	77,580.3	-0.14	-2.40	-2.28	-7.97	7.39	4.13	22.30	1.19	152,618.28

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,319.4	0.28	0.28	2.26	2.57	7.36	1.50	15.60	3.65	43.96
Kuwait Premier Index	7,848.9	0.23	0.23	2.31	1.82	4.97	1.60	16.43	3.46	35.81
Kuwait Main Index	6,654.9	0.50	0.50	2.01	6.03	19.48	1.17	12.48	4.54	8.15
Kuwait Sector										
Banking	1,796.6	0.39	0.39	2.88	2.48	9.05	1.78	17.34	3.06	26.81
Telecom	1,022.4	-0.38	-0.38	0.88	-0.55	-7.48	1.50	12.73	8.19	3.14
Industrials	709.2	-0.54	-0.54	1.54	-2.26	-21.89	0.76	12.05	6.20	2.42
Financial Services	1,467.8	-0.84	-0.84	1.26	4.05	21.08	1.21	12.73	2.77	4.95
Real Estate	1,395.4	0.34	0.34	-0.98	1.44	15.04	1.07	15.53	2.06	2.95
Basic Materials	890.6	5.80	5.80	4.78	10.32	19.40	1.51	12.68	10.41	0.48
Health Care	468.2	3.07	3.07	-0.54	-0.54	-2.90	1.52	17.18	2.31	
Consumer Staples	1,012.4	0.85	0.85	-6.90	0.85	53.73	2.18	20.46	2.05	0.30
Insurance	1,989.4	-0.30	-0.30	-3.70	-4.53	-13.23	1.09	10.85	3.98	0.81
Consumer Discretionary	2,167.3	1.88	1.88	9.62	19.99	35.13				
Energy	1,193.4	1.65	1.65	3.80	6.79	25.76	1.00	9.89	5.40	0.24
Technology	1,156.7	5.30	5.30	6.71	-20.10	100.00	1.27	457.58		0.02
Utilities	447.4	4.94	4.94	9.68	14.87	-1.73				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged up on Monday after fighting between Russia and Ukraine intensified over the weekend, although concerns about fuel demand in China, the world's second-largest consumer, and forecasts of a global oil surplus weighed on markets.

Brent crude futures gained 20 cents, or 0.3%, to \$71.24 a barrel by 0130 GMT, while U.S. West Texas Intermediate crude futures were at \$67.11 a barrel, up 9 cents, or 0.1%.

Kuwait Market

The market closed up by 0.28% at 7,319.4 value traded 72.2 million KD, Premier market value reached 29.4 million KD up by 0.23% at 7,7848.9.

KSA Market

The market closed up by 0.18% at 11,811.98.

DAILY MARKETS WRAP,

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* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.872	0.23	0.23	2.59	-1.25	2.42	1.64	12.86	3.88	7.28
KFH	0.747	0.54	0.54	3.61	4.33	12.15	2.15	20.37	2.57	12.81
ZAIN	0.469	-0.64	-0.64	2.85	-1.26	-7.50	1.77	11.34	7.46	2.03
BOUBYAN BANK	0.574	0.70	0.70	2.87	0.70	1.41	2.32	27.77	1.31	2.42
AGILITY	0.265	-1.49	-1.49	6.43	21.00	-6.43	0.69	11.06	7.55	0.71
Saudi Arabia										
ARAMCO	27.65	-1.25	-1.25	2.41	2.03	-16.21	4.49	16.31	6.97	6,690.94
SABIC	70.10	0.43	0.43	-3.58	-6.41	-16.05	1.27	85.12	4.71	210.29
STC	40.05	-0.37	-0.37	-4.98	-8.35	1.79	2.52	15.72	4.00	200.24
AL-RAJHI BANK	89.30	-1.11	-1.11	1.48	2.41	3.24	3.03	20.41	2.69	357.18
NCB	33.30	0.91	0.91	0.45	-2.92	-13.84	1.08	10.00	5.41	199.79
Abu Dhabi										
ETISALAT.AD	17.40	-0.11	-1.36	-1.81	-5.95	-11.41	3.50	13.67	4.68	151.32
FAB.AD	13.28	0.00	-0.15	1.07	-3.35	-4.87	1.14	9.09	5.35	146.71
EMIRATES NBD	19.30	0.00	0.52	1.58	-4.93	11.56	0.99	5.41	6.22	121.91
DB ISLAMIC DB	6.56	0.31	3.14	4.96	4.13	14.69	1.03	6.80	6.86	47.50
EMAR.DU	9.26	-1.07	4.87	6.56	6.19	16.92	1.02	6.87	5.40	81.85
Qatar										
QNB	16.810	-1.41	-1.41	-3.11	-0.83	1.69	1.39	10.22	3.90	155.26
INDUSTREIS QAT	13.080	0.15	0.15	-2.02	0.31	0.00	2.15	14.81	5.35	79.13
QA ISLAMIC BK	21.000	-0.24	-0.24	2.44	-1.64	-2.33	1.64	11.55	2.92	49.62
MASRAF AL RAYA	2.342	-0.59	-0.59	-1.26	-5.18	-11.79	0.87	14.96	4.27	21.78
MESAEED PETRO	1.537	-0.26	-0.26	-2.84	-5.71	-14.04	1.19	24.12	4.55	19.31
Oman										
BANK MUSCAT	0.253	-0.39	-0.39	-1.94	0.40	-4.17	0.79	9.44	6.13	1.90
OMANTEL	0.978	0.00	0.00	-1.01	-0.91	-7.74	1.18	11.44	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	0.290	0.00	0.00	-3.33	0.00	3.57	0.67	9.89	2.93	0.47
OMINVEST	0.343	0.29	0.29	-6.03	-2.56	-13.23	0.73	7.79	5.83	0.23

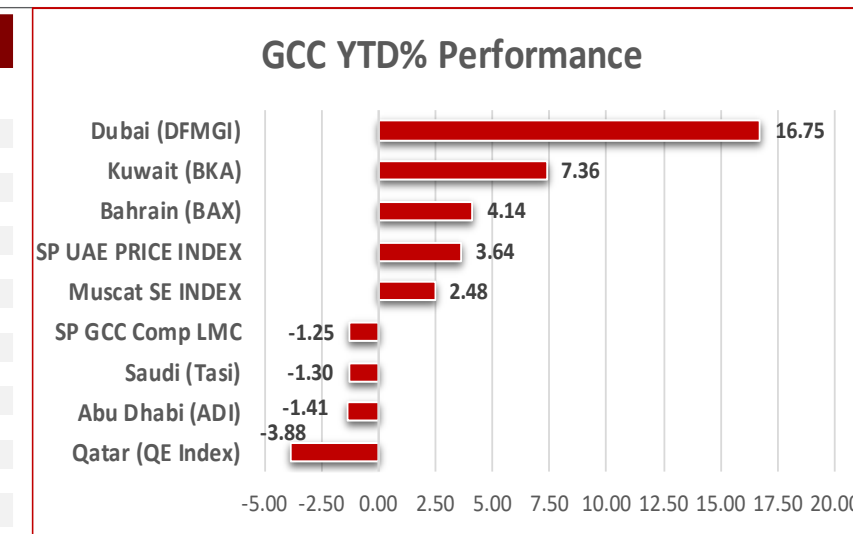
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
06-Nov. 24	24.64%	16.00%	0.06%	3.72%	8.06%	17.71%	13.09%	6.06%	6.04%
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by +0.28 %, The leading sector best performance indices today is Technology 5.3%.

KSA

Saudi Armco has a negative performance today by - 1.25 %, SABIC have positive performance today by 0.43%, STC have negative performance today by -0.37 %, Al Rajhi Bank have negative performance today by -0.48%.



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