

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 19th November 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

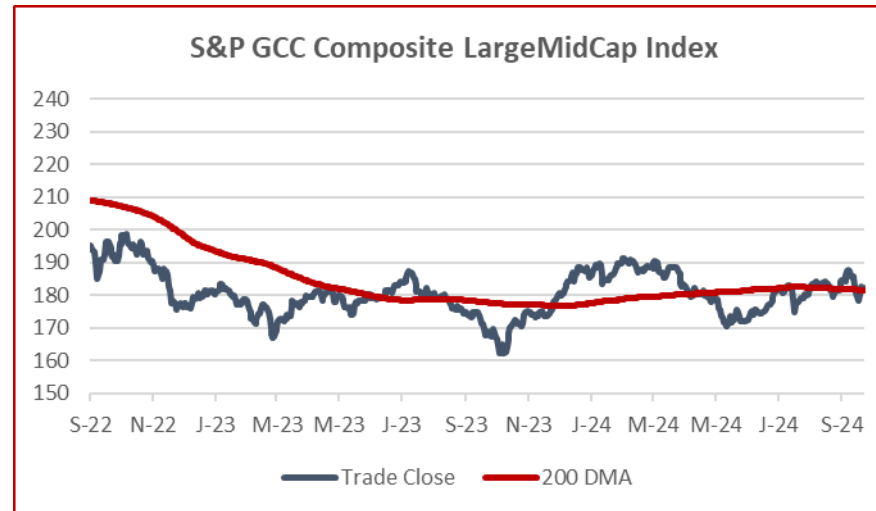


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,830.4	0.16	0.33	-1.59	-3.24	-1.14	2.96	22.82	3.11	10,105.77
Qatar (QE Index)	10,453.4	0.41	-0.02	-0.67	-1.51	-3.48	1.22	11.60	4.29	530.01
Dubai (DFMGI)	4,712.7	-0.57	-0.57	2.65	4.64	16.08	1.67	9.34	5.02	704.75
Abu Dhabi (ADI)	9,387.1	-0.59	-0.59	0.63	-0.41	-1.99	2.72	16.75	2.08	2,654.70
Bahrain (BAX)	2,046.1	-0.34	-0.31	1.35	1.66	3.78	0.93	10.01	4.43	7.93
Muscat SE INDEX	4,618.3	-0.16	-0.54	-2.76	-1.95	2.31	0.84	9.68	5.92	7.32
SP GCC Comp LMC	183.3	0.39	0.47	0.13	-1.22	-0.87	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.3	0.33	0.33	2.10	0.96	3.98				

Developed Markets										
MSCI World Index	3,723.4	0.35	0.35	2.09	0.01	17.49				
U.S. (S&P 500)	5,893.6	0.39	0.39	3.30	2.28	23.56	4.85	27.81	1.54	52,216.41
U.K. (FTSE 100)	8,109.3	0.57	0.57	-0.01	-1.55	4.86	1.67	15.38	3.74	2,098.76
Japan (topix)	2,691.8	-0.73	-0.73	-0.14	1.73	13.75	1.41	14.31	2.31	944,404.83
Emerging Markets										
MSCI EM Index	1,089.7	0.44	0.44	-2.66	-6.93	6.45				
China (SSE Composite)	3,323.8	-0.21	-0.21	1.34	-0.38	11.73	1.36	12.00		44,025.04
India (Sensex)	77,339.0	-0.31	-0.31	-2.58	-8.26	7.06	4.12	22.23	1.19	151,939.15

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,320.3	0.01	0.29	2.27	2.58	7.38	1.50	15.62	3.64	44.08
Kuwait Premier Index	7,851.6	0.03	0.27	2.35	1.85	5.01	1.60	16.50	3.45	35.89
Kuwait Main Index	6,649.5	-0.08	0.42	1.93	5.94	19.39	1.17	12.39	4.53	8.19
Kuwait Sector										
Banking	1,799.9	0.18	0.58	3.07	2.67	9.25	1.78	17.41	3.05	26.91
Telecom	1,021.6	-0.09	-0.47	0.79	-0.64	-7.56	1.50	12.68	8.22	3.12
Industrials	706.3	-0.41	-0.94	1.13	-2.66	-22.21	0.75	11.98	6.23	2.40
Financial Services	1,444.2	-1.61	-2.44	-0.37	2.38	19.14	1.20	12.68	2.80	4.91
Real Estate	1,396.5	0.08	0.41	-0.90	1.52	15.13	1.07	15.93	2.05	2.96
Basic Materials	973.2	9.28	15.62	14.50	20.56	30.47	1.60	13.41	9.84	0.50
Health Care	468.2	0.00	3.07	-0.54	-0.54	-2.90	1.57	17.71	2.24	
Consumer Staples	1,000.1	-1.22	-0.38	-8.04	-0.38	51.85	2.20	20.63	2.03	0.31
Insurance	2,004.7	0.77	0.46	-2.96	-3.79	-12.57	1.08	9.94	3.99	0.80
Consumer Discretionary	2,165.2	-0.10	1.78	9.51	19.87	34.99				
Energy	1,192.7	-0.06	1.58	3.73	6.72	25.67	1.02	9.46	5.31	0.24
Technology	1,127.6	-2.52	2.65	4.03	-22.11	94.97	1.34	481.82		0.02
Utilities	439.5	-1.77	3.08	7.74	12.84	-3.47				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices retreated on Tuesday after the previous day's rally driven by halted production at Norway's Johan Sverdrup oilfield, but investors remained cautious amid fears of a potential escalation in the Russia-Ukraine war.

Brent crude futures for January delivery slipped 7 cents, or 0.1%, to \$73.37 a barrel by 0119 GMT, while U.S. West Texas Intermediate crude futures for December delivery CLC1 were at \$69.23 a barrel, down 7 cents, or 0.1%. The more active WTI January contract fell 4 cents, or 0.1%, to \$69.21.

Kuwait Market

The market closed up by 0.01% at 7,320.3 value traded 83.8 million KD, Premier market value reached 42.8 million KD up by 0.03% at 7,851.6

KSA Market

The market closed up by 0.16% at 11,830.4.

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	0.876	0.46	0.69	3.06	-0.79	2.89	1.65	12.92	3.86	7.28
KFH	0.750	0.40	0.94	4.02	4.75	12.60	2.16	20.45	2.56	12.81
ZAIN	0.469	0.00	-0.64	2.85	-1.26	-7.50	1.77	11.34	7.46	2.03
BOUBYAN BANK	0.575	0.17	0.88	3.05	0.88	1.58	2.33	27.82	1.31	2.41
AGILITY	0.264	-0.38	-1.86	6.02	20.55	-6.79	0.69	11.02	7.58	0.71
Saudi Arabia										
ARAMCO	27.80	0.54	-0.71	2.96	2.58	-15.76	4.52	16.40	6.93	6,725.63
SABIC	69.70	-0.57	-0.14	-4.13	-6.94	-16.53	1.26	84.63	4.73	209.04
STC	40.00	-0.12	-0.50	-5.10	-8.47	1.66	2.52	15.70	4.00	199.94
AL-RAJHI BANK	91.50	2.46	1.33	3.98	4.93	5.78	3.11	20.91	2.62	365.89
NCB	33.15	-0.45	0.45	0.00	-3.35	-14.23	1.08	9.95	5.43	198.84
Abu Dhabi										
ETISALAT.AD	17.40	0.00	0.00	-1.81	-5.95	-11.41	3.50	13.67	4.68	151.32
FAB.AD	13.48	1.51	1.51	2.59	-1.89	-3.44	1.15	9.22	5.27	148.92
EMIRATES NBD	19.40	0.52	0.52	2.11	-4.43	12.14	0.99	5.44	6.19	122.54
DB ISLAMIC DB	6.59	0.46	0.46	5.44	4.60	15.21	1.03	6.83	6.83	47.72
EMAR.DU	9.43	1.84	1.84	8.52	8.14	19.07	1.04	7.00	5.30	83.35
Qatar										
QNB	17.090	1.67	0.23	-1.50	0.83	3.39	1.41	10.39	3.83	157.52
INDUSTREIS QAT	13.100	0.15	0.31	-1.87	0.46	0.15	2.15	14.84	5.34	79.09
QA ISLAMIC BK	20.990	-0.05	-0.29	2.39	-1.69	-2.37	1.63	11.54	2.92	49.49
MASRAF AL RAYA	2.341	-0.04	-0.64	-1.31	-5.22	-11.83	0.87	14.95	4.27	21.73
MESAEED PETRO	1.540	0.20	-0.06	-2.65	-5.52	-13.87	1.19	24.17	4.55	19.31
Oman										
BANK MUSCAT	0.253	0.00	-0.39	-1.94	0.40	-4.17	0.79	9.44	6.13	1.90
OMANTEL	0.958	-2.04	-2.04	-3.04	-2.94	-9.62	1.16	11.20	6.26	0.72
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	0.344	0.29	0.58	-5.75	-2.27	-12.98	0.73	7.81	5.81	0.23

* GCC Markets performance at the latest close.

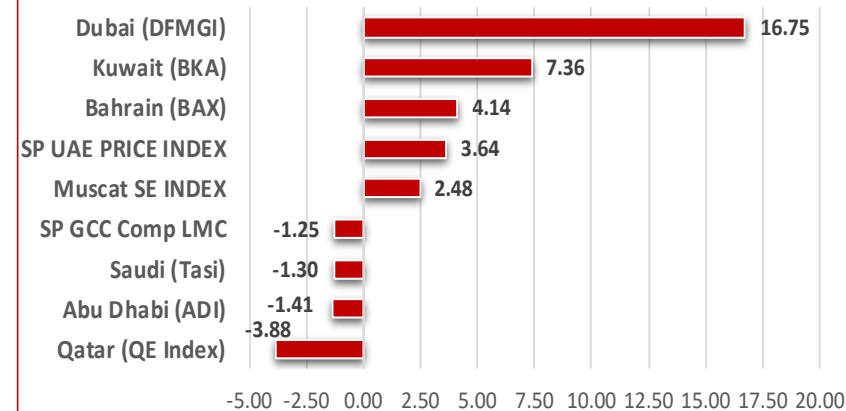
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
06-Nov. 24	24.64%	16.00%	0.06%	3.72%	8.06%	17.71%	13.09%	6.06%	6.04%
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

Kuwait

The market is up today by +0.01 %, The leading sector best performance indices today is Insurance up by 0.8%.

KSA

Saudi Armco has positive performance today by +0.54%, SABIC has negative performance today by -0.57%, STC have negative performance today by -0.12 %, Al Rajhi Bank have negative performance today by 2.5%.

UAE

ETISALAT.AD has flat performance today 0%, FAB.AD has positive performance today 1.5 %



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