

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

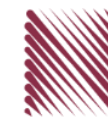
GCC DAILY MORNING BRIEF

Thursday, 21st November 2024



DAILY MARKETS WRAP,

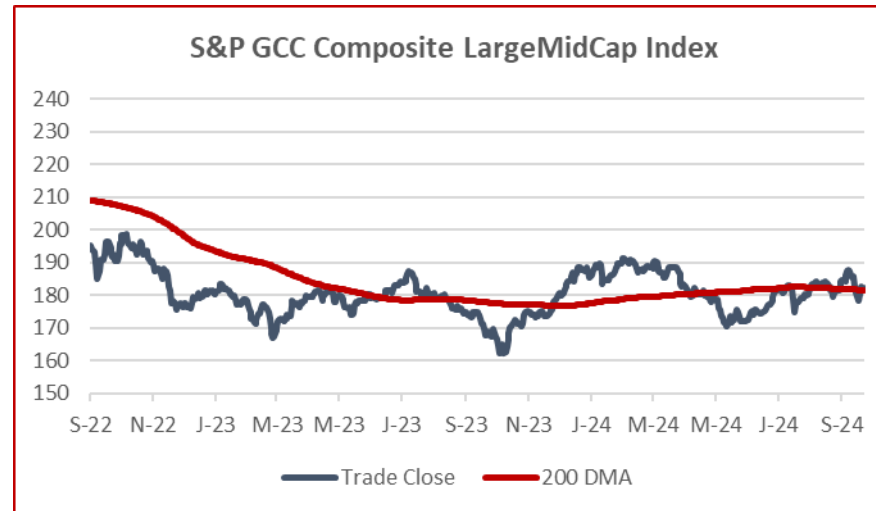
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,867.9	-0.07	0.65	-1.28	-2.93	-0.83	3.00	23.13	3.06	10,158.03
Qatar (QE Index)	10,438.2	0.12	-0.16	-0.82	-1.66	-3.62	1.22	11.59	4.29	529.09
Dubai (DFMGI)	4,760.7	0.61	0.44	3.69	5.71	17.26	1.69	9.45	4.97	713.10
Abu Dhabi (ADI)	9,405.2	-0.23	-0.40	0.83	-0.22	-1.80	2.73	16.79	2.08	2,660.97
Bahrain (BAX)	2,042.8	-0.37	-0.47	1.18	1.49	3.62	0.93	9.87	4.44	7.91
Muscat SE INDEX	4,608.8	-0.20	-0.75	-2.96	-2.15	2.10	0.84	9.67	5.92	7.31
SP GCC Comp LMC	184.2	0.10	0.93	0.59	-0.77	-0.41	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	144.5	0.48	1.14	2.93	1.78	4.82				
Developed Markets										
MSCI World Index	3,732.8	-0.17	0.60	2.35	0.26	17.78				
U.S. (S&P 500)	5,917.1	0.00	0.79	3.71	2.68	24.05	4.89	28.03	1.53	52,647.25
U.K. (FTSE 100)	8,085.1	-0.17	0.27	-0.31	-1.84	4.55	1.66	15.22	3.75	2,092.53
Japan (topix)	2,698.3	-0.43	-0.49	0.10	1.98	14.03	1.41	14.14	2.31	946,725.76
Emerging Markets										
MSCI EM Index	1,093.8	-0.10	0.82	-2.29	-6.58	6.85				
China (SSE Composite)	3,368.0	0.66	1.12	2.69	0.94	13.21	1.36	12.00		44,025.04
India (Sensex)	77,578.4	0.31	0.00	-2.28	-7.97	7.39	4.13	22.30	1.19	152,135.49

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,353.0	-0.08	0.74	2.73	3.04	7.86	1.51	15.69	3.62	44.32
Kuwait Premier Index	7,868.9	-0.08	0.49	2.58	2.08	5.24	1.61	16.55	3.44	36.01
Kuwait Main Index	6,745.9	-0.09	1.87	3.41	7.48	21.12	1.19	12.52	4.47	8.30
Kuwait Sector										
Banking	1,802.4	-0.07	0.71	3.21	2.81	9.40	1.79	17.48	3.03	27.02
Telecom	1,024.6	-0.03	-0.17	1.10	-0.34	-7.28	1.50	12.72	8.20	3.13
Industrials	709.6	-0.58	-0.48	1.60	-2.20	-21.84	0.76	11.81	6.19	2.42
Financial Services	1,459.1	-0.14	-1.43	0.66	3.44	20.37	1.20	12.68	2.81	4.88
Real Estate	1,389.7	-0.86	-0.07	-1.38	1.02	14.58	1.08	16.00	2.05	2.97
Basic Materials	1,116.6	5.17	32.65	31.37	38.32	49.70	1.91	15.99	8.25	0.60
Health Care	468.2	0.00	3.07	-0.54	-0.54	-2.90	1.57	17.71	2.24	
Consumer Staples	1,006.6	-1.28	0.27	-7.44	0.27	52.84	2.21	20.78	2.02	0.31
Insurance	1,986.4	-0.25	-0.45	-3.85	-4.67	-13.36	1.09	9.87	3.98	0.81
Consumer Discretionary	2,195.5	0.33	3.21	11.04	21.55	36.88				
Energy	1,202.5	0.55	2.42	4.59	7.60	26.71	1.02	9.46	5.30	0.24
Technology	1,156.7	1.27	5.30	6.71	-20.10	100.00	1.32	475.76		0.02
Utilities	447.4	-0.58	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 higher on Thursday due to supply concerns triggered by escalating geopolitical tensions amid the ongoing war between Russia and Ukraine.

Brent crude futures for January rose 28 cents, or 0.4%, to \$73.09. U.S. West Texas Intermediate crude futures for January rose 28 cents, or 0.4%, at \$69.03.

Kuwait Market

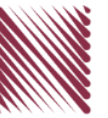
The market closed down by 0.08% at 7,353 value traded 65.5 million KD, Premier market value reached 33.6 million KD down by 0.08% at 7,868.9

KSA Market

The market closed down by 0.07% at 11,867.9.

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	0.882	0.23	1.38	3.76	-0.11	3.59	1.66	13.01	3.83	7.35
KFH	0.748	-0.27	0.67	3.74	4.47	12.30	2.15	20.39	2.56	12.80
ZAIN	0.469	-0.21	-0.64	2.85	-1.26	-7.50	1.77	11.34	7.46	2.03
BOUBYAN BANK	0.571	-0.17	0.18	2.33	0.18	0.88	2.31	27.62	1.32	2.40
AGILITY	0.269	-1.82	0.00	8.03	22.83	-5.02	0.70	11.23	7.43	0.72
Saudi Arabia										
ARAMCO	28.00	0.18	0.00	3.70	3.32	-15.15	4.55	16.52	6.88	6,776.36
SABIC	69.90	-0.14	0.14	-3.85	-6.68	-16.29	1.27	84.87	4.72	209.71
STC	39.80	0.38	-1.00	-5.58	-8.92	1.15	2.50	15.63	4.02	199.01
AL-RAJHI BANK	93.00	-0.32	2.99	5.68	6.65	7.51	3.16	21.26	2.58	372.02
NCB	33.30	0.45	0.91	0.45	-2.92	-13.84	1.08	10.00	5.41	199.81
Abu Dhabi										
ETISALAT.AD	17.44	0.46	0.23	-1.58	-5.73	-11.20	3.51	13.70	4.67	151.66
FAB.AD	13.32	-0.89	0.30	1.37	-3.06	-4.58	1.14	9.12	5.33	147.14
EMIRATES NBD	19.95	2.84	3.37	5.00	-1.72	15.32	1.02	5.60	6.02	126.01
DB ISLAMIC DB	6.72	-0.15	2.44	7.52	6.67	17.48	1.06	6.96	6.70	48.65
EMAR.DU	9.71	0.00	4.86	11.74	11.35	22.60	1.07	7.20	5.15	85.82
Qatar										
QNB	17.110	0.53	0.35	-1.38	0.94	3.51	1.42	10.40	3.83	157.54
INDUSTREIS QAT	12.950	-0.99	-0.84	-3.00	-0.69	-0.99	2.12	14.67	5.41	78.10
QA ISLAMIC BK	21.070	0.43	0.10	2.78	-1.31	-2.00	1.64	11.59	2.91	49.63
MASRAF AL RAYA	2.346	0.26	-0.42	-1.10	-5.02	-11.64	0.87	14.98	4.26	21.75
MESAEED PETRO	1.544	0.52	0.19	-2.40	-5.28	-13.65	1.20	24.23	4.53	19.34
Oman										
BANK MUSCAT	0.255	0.79	0.39	-1.16	1.19	-3.41	0.80	9.51	6.08	1.91
OMANTEL	0.950	-0.84	-2.86	-3.85	-3.75	-10.38	1.15	11.11	6.32	0.71
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	0.00	0.58	-5.75	-2.27	-12.98	0.73	7.81	5.81	0.23

* GCC Markets performance at the latest close.

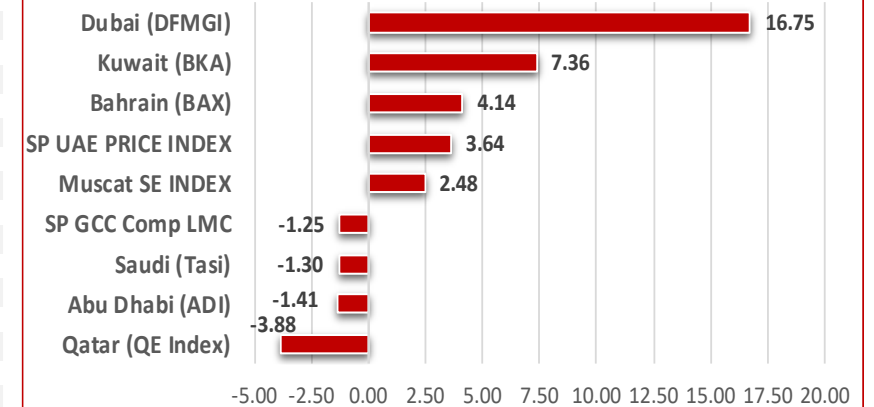
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
06-Nov. 24	24.64%	16.00%	0.06%	3.72%	8.06%	17.71%	13.09%	6.06%	6.04%
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%

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 down today by -0.08 %, The leading sector best performance indices today is Technology up by 1.3%.

KSA

Saudi Armco has positive performance today by +0.18%, SABIC has negative performance today by - 0.14%, STC has positive performance by + 0.38%, Al Rajhi Bank has negative performance by - 0.32%.

UAE

ETISALAT.AD has positive performance today by + 0.46%, FAB.AD has negative performance today by - 0.89 %



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