

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

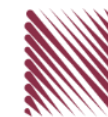
GCC DAILY MORNING BRIEF

Sunday, 24th November 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

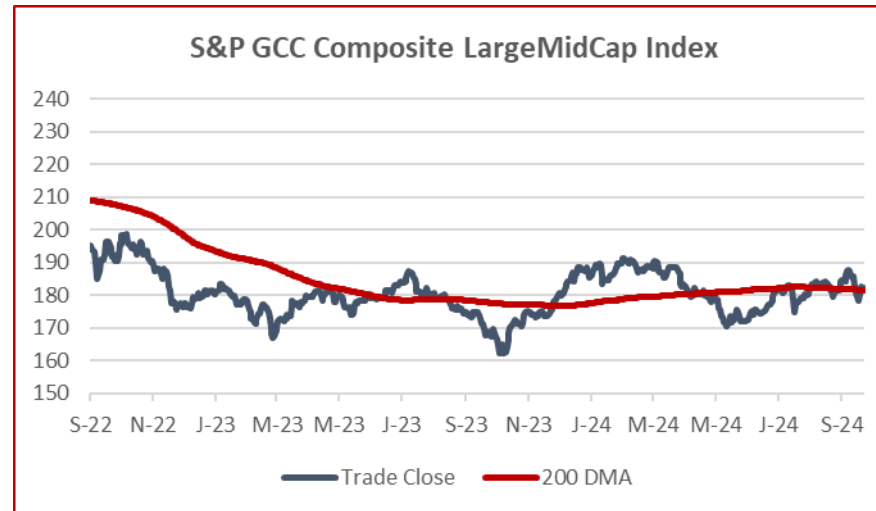


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,840.5	-0.23	0.42	-1.51	-3.15	-1.06	2.99	23.05	3.07	10,134.16
Qatar (QE Index)	10,394.8	-0.42	-0.58	-1.23	-2.07	-4.02	1.22	11.54	4.31	527.25
Dubai (DFMGI)	4,723.6	-0.13	-0.34	2.89	4.89	16.35	1.67	9.34	5.02	706.05
Abu Dhabi (ADI)	9,231.7	-0.88	-2.24	-1.03	-2.06	-3.61	2.69	16.52	2.12	2,638.52
Bahrain (BAX)	2,034.3	-0.41	-0.88	0.76	1.07	3.19	0.95	9.83	4.41	7.75
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	182.9	-0.15	0.22	-0.12	-1.47	-1.11	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.4	-0.69	-1.03	0.72	-0.41	2.57				

Developed Markets										
MSCI World Index	3,766.0	0.33	1.49	3.26	1.15	18.83				
U.S. (S&P 500)	5,969.3	0.35	1.68	4.63	3.59	25.15	4.94	28.13	1.52	53,109.81
U.K. (FTSE 100)	8,262.1	1.38	2.46	1.87	0.31	6.84	1.69	15.64	3.67	2,136.65
Japan (topix)	2,696.5	0.51	-0.56	0.04	1.91	13.95	1.41	14.22	2.31	946,145.74
Emerging Markets										
MSCI EM Index	1,087.3	0.16	0.21	-2.88	-7.14	6.21				
China (SSE Composite)	3,267.2	-3.06	-1.91	-0.39	-2.08	9.82	1.36	12.00		44,025.04
India (Sensex)	79,117.1	2.54	1.98	-0.34	-6.15	9.52	4.21	22.74	1.17	155,345.71

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,319.3	-0.46	0.28	2.26	2.56	7.36	1.50	15.53	3.64	44.07
Kuwait Premier Index	7,836.0	-0.42	0.07	2.15	1.65	4.80	1.60	16.41	3.46	35.83
Kuwait Main Index	6,703.4	-0.63	1.23	2.75	6.80	20.35	1.18	12.28	4.50	8.24
Kuwait Sector										
Banking	1,793.8	-0.47	0.24	2.72	2.32	8.88	1.78	17.38	3.05	26.87
Telecom	1,015.1	-0.93	-1.10	0.16	-1.26	-8.14	1.49	12.60	8.28	3.10
Industrials	710.0	0.05	-0.43	1.65	-2.15	-21.80	0.76	11.74	6.22	2.41
Financial Services	1,463.2	0.28	-1.15	0.95	3.73	20.71	1.20	12.56	2.80	4.89
Real Estate	1,386.2	-0.25	-0.32	-1.63	0.77	14.29	1.07	15.78	2.07	2.94
Basic Materials	1,057.8	-5.27	25.66	24.45	31.03	41.81	1.90	13.69	8.28	0.60
Health Care	468.2	0.00	3.07	-0.54	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	997.0	-0.95	-0.68	-8.32	-0.68	51.39	2.16	20.32	2.06	0.30
Insurance	1,986.2	-0.01	-0.46	-3.86	-4.68	-13.37	1.08	9.84	4.00	0.80
Consumer Discretionary	2,184.4	-0.50	2.69	10.48	20.94	36.19				
Energy	1,186.4	-1.33	1.05	3.19	6.16	25.02	1.01	9.36	5.34	0.24
Technology	1,134.9	-1.89	3.31	4.70	-21.61	96.23	1.32			0.02
Utilities	436.8	-2.35	2.47	7.10	12.16	-4.05				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose on Friday, posting a weekly gain of more than 5%, as the Ukraine war intensified, and Chinese imports were set to increase in November.

Brent crude futures climbed 94 cents, or 1.27%, to close at \$75.17 a barrel. West Texas Intermediate, crude futures rose \$1.14, or 1.63%, to settle at \$71.24 per barrel.

Kuwait Market

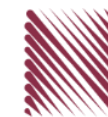
The market closed down by 0.46% at 7,319.3 value traded 67.4 million KD, Premier market value reached 32.2 million KD down by 0.42% at 7,836

KSA Market

The market closed down by 0.23% at 11,840.5.

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	0.878	-0.45	0.92	3.29	-0.57	3.12	1.65	12.95	3.85	7.31
KFH	0.744	-0.53	0.13	3.19	3.91	11.70	2.14	20.28	2.58	12.73
ZAIN	0.463	-1.28	-1.91	1.54	-2.53	-8.68	1.75	11.20	7.56	2.00
BOUBYAN BANK	0.569	-0.35	-0.18	1.97	-0.18	0.52	2.30	27.53	1.33	2.39
AGILITY	0.273	1.49	1.49	9.64	24.66	-3.61	0.71	11.39	7.33	0.73
Saudi Arabia										
ARAMCO	27.95	-0.18	-0.18	3.52	3.14	-15.30	4.54	16.49	6.89	6,763.90
SABIC	69.70	-0.29	-0.14	-4.13	-6.94	-16.53	1.26	84.63	4.73	209.10
STC	39.95	0.38	-0.62	-5.22	-8.58	1.53	2.51	15.68	4.01	199.75
AL-RAJHI BANK	93.50	0.54	3.54	6.25	7.22	8.09	3.18	21.37	2.57	374.00
NCB	33.10	-0.60	0.30	-0.15	-3.50	-14.36	1.07	9.94	5.44	198.60
Abu Dhabi										
ETISALAT.AD	17.10	-0.58	-2.30	-4.06	-8.11	-13.44	3.42	13.35	4.79	147.84
FAB.AD	13.04	-1.07	-2.86	-1.83	-6.11	-7.59	1.10	8.83	5.50	142.51
EMIRATES NBD	19.50	-1.02	1.04	2.63	-3.94	12.72	1.00	5.47	6.15	123.17
DB ISLAMIC DB	6.53	0.46	-0.46	4.48	3.65	14.16	1.03	6.76	6.89	47.28
EMAR.DU	9.40	-1.05	1.51	8.17	7.80	18.69	1.03	6.97	5.32	83.08
Qatar										
QNB	17.100	-0.06	0.29	-1.44	0.88	3.45	1.42	10.39	3.83	157.94
INDUSTREIS QAT	12.900	-0.39	-1.23	-3.37	-1.07	-1.38	2.12	14.61	5.43	78.05
QA ISLAMIC BK	20.710	-1.71	-1.62	1.02	-3.00	-3.67	1.61	11.39	2.96	48.94
MASRAF AL RAYA	2.341	-0.21	-0.64	-1.31	-5.22	-11.83	0.87	14.95	4.27	21.77
MESAEED PETRO	1.532	-0.78	-0.58	-3.16	-6.01	-14.32	1.19	24.04	4.57	19.25
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	1.12	11.24	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.

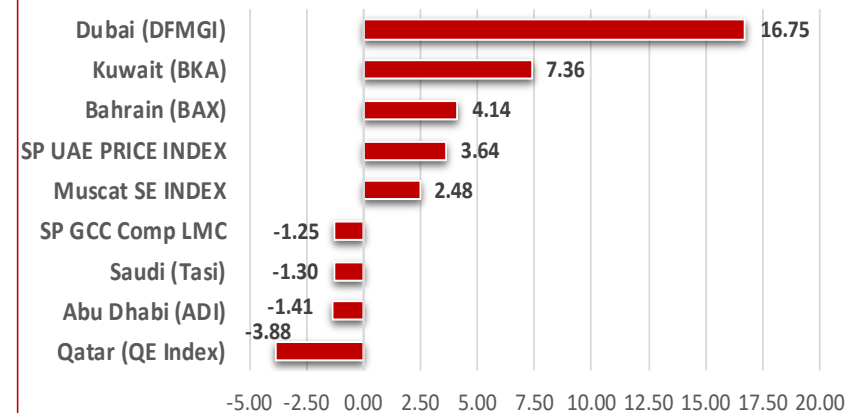
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%
20-Nov. 24	24.65%	15.97%	0.06%	3.71%	8.13%	17.80%	13.15%	5.97%	6.01%

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 Financial Services up by 0.3%.

KSA

Saudi Armco has negative performance today by -0.18%, SABIC has negative performance today by - 0.29%, STC has positive performance by + 0.38%, Al Rajhi Bank has positive performance by +0.54%.

UAE

ETISALAT.AD has negative performance today by – 0.58%, FAB.AD has negative performance today by – 1.07 %



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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