



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday , 18th July 2024





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* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,188.3	0.25	3.36	4.36	4.36	1.85	3.30	26.16	3.16	10,341.55
Qatar (QE Index)	10,034.3	-1.16	-1.41	0.67	0.67	-7.35	1.15	11.58	4.67	504.73
Dubai (DFMGI)	4,181.0	0.28	1.88	3.75	3.75	2.98	1.45	8.47	5.77	622.71
Abu Dhabi (ADI)	9,233.7	0.08	0.99	1.91	1.91	-3.59	2.67	16.53	2.08	2,575.29
Bahrain (BAX)	1,979.5	-0.32	-0.62	-2.27	-2.27	0.41	0.88	11.26	4.50	7.65
Muscat SE INDEX	4,697.3	0.10	-0.06	0.21	0.21	4.06	0.83	10.13	5.83	7.30
SP GCC Comp LMC	181.7	0.03	2.62	3.85	3.85	-1.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	132.6	0.24	2.33	3.87	3.87	-3.79				

Developed Markets

MSCI World Index	3,553.8	-0.73	-2.03	1.20	1.20	12.14				
U.S. (S&P 500)	5,505.0	-0.71	-1.97	0.82	0.82	15.41	4.59	26.85	1.60	48,848.59
U.K. (FTSE 100)	8,155.7	-0.60	-1.18	-0.10	-0.10	5.46	1.74	14.65	3.74	2,124.95
Japan (topix)	2,860.8	-0.27	-1.17	1.82	1.82	20.89	1.49	15.83	2.02	1,003,963.56

Emerging Markets

MSCI EM Index	1,089.6	-1.48	-3.02	0.31	0.31	6.43				
China (SSE Composite)	2,982.3	0.17	0.37	0.50	0.50	0.25	1.36	12.00		44,025.04
India (Sensex)	80,604.7	-0.91	0.11	1.99	1.99	11.58	4.95	23.94	1.12	159,694.92

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,102.2	-0.21	0.06	2.38	2.38	4.18	1.46	15.04	3.69	39.52
Kuwait Premier Index	7,758.7	-0.18	0.09	2.85	2.85	3.77	1.61	16.62	3.47	32.57
Kuwait Main Index	5,919.4	-0.39	-0.07	0.12	0.12	6.28	1.03	9.98	4.72	6.95
Kuwait Sector										
Banking	1,755.4	-0.24	0.19	2.53	2.53	6.55	1.74	17.25	3.04	26.29
Telecom	993.8	-0.27	-0.50	1.03	1.03	-10.08	1.46	11.85	8.46	3.04
Industrials	791.3	0.31	-0.27	2.42	2.42	-12.84	0.84	11.80	5.46	2.68
Financial Services	1,349.0	0.04	-0.15	2.88	2.88	11.29	1.16	10.87	3.50	3.72
Real Estate	1,370.5	-0.04	0.37	5.78	5.78	12.99	0.77	11.88	2.29	1.60
Basic Materials	752.7	-0.25	-0.20	-0.37	-0.37	0.91	1.35	13.20	11.64	0.42
Health Care	468.0	0.00	0.39	5.97	5.97	-2.93	1.56	14.30	1.84	
Consumer Staples	895.7	-0.07	-0.38	8.65	8.65	36.00	1.94	19.88	2.29	0.27
Insurance	2,170.5	-5.46	-3.01	-13.86	-13.86	-5.33	1.18	10.64	3.66	0.88
Consumer Discretionary	1,624.0	1.74	2.32	5.46	5.46	1.26				
Energy	1,069.4	2.09	-1.16	3.80	3.80	12.69	0.91	9.94	6.29	0.22
Technology	1,666.0	0.00	-0.44	5.05	5.05	188.05	1.93	275.90		0.02
Utilities	442.1	0.60	0.60	5.00	5.00	-2.89				

* International and GCC Markets performance at the latest close.

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices dropped on Friday by more than \$2 as investors reacted to renewed hopes of a ceasefire in Gaza, while a strengthened dollar further pressured the market. Brent crude prices were down \$2.48, or 2.91%, to \$82.63 a barrel.

Kuwait Market

The market closed down by -0.21% at 7,102.2 value traded 27.8 million KD, Premier market value reached 21.0 million KD down by -0.18% at 7,758.7.

KSA Market

The market closed up by +0.25% at 12,188.3.

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	0.871	0.11	1.40	1.75	1.75	2.30	1.66	13.05	3.88	7.29
KFH	0.725	-0.55	-0.28	2.84	2.84	8.85	2.12	21.34	2.53	12.47
ZAIN	0.451	-0.22	-1.31	1.12	1.12	-11.05	1.57	10.24	7.76	1.96
BOUBYAN BANK	0.579	-0.34	0.00	2.66	2.66	2.29	2.39	29.42	1.30	2.45
AGILITY	0.287	0.70	-0.35	2.87	2.87	1.34	0.77	8.43	6.97	0.77
Saudi Arabia										
ARAMCO	28.45	0.35	1.07	1.97	1.97	-13.79	4.52	15.69	6.59	6,884.53
SABIC	79.10	0.38	5.47	7.18	7.18	-5.27	1.42	207.49	4.17	237.29
STC	38.70	-0.13	0.65	1.57	1.57	-1.64	2.40	14.36	4.13	193.49
AL-RAJHI BANK	84.00	0.84	4.35	5.00	5.00	-2.89	3.10	20.94	2.74	335.98
NCB	38.30	1.59	6.39	5.66	5.66	-0.91	1.27	11.82	4.57	229.79
Abu Dhabi										
ETISALAT.AD	16.30	-0.12	1.75	1.12	1.12	-17.11	3.25	13.55	4.91	141.56
FAB.AD	12.60	0.00	1.45	1.12	1.12	-9.74	1.16	8.75	5.63	139.18
EMIRATES NBD	17.55	0.29	4.15	6.36	6.36	1.45	0.95	4.92	6.84	110.84
DB ISLAMIC DB	5.96	-0.67	3.11	3.83	3.83	4.20	1.01	6.64	7.55	43.15
EMAR.DU	8.35	0.48	3.09	1.83	1.83	5.43	0.93	6.51	5.99	73.79
Qatar										
QNB	14.780	-2.64	-2.12	0.89	0.89	-10.59	1.25	9.15	4.43	136.49
INDUSTREIS QAT	12.960	-1.52	-2.04	0.62	0.62	-0.92	2.15	16.22	6.02	78.39
QA ISLAMIC BK	19.150	-0.67	-2.79	2.96	2.96	-10.93	1.52	10.78	3.20	45.24
MASRAF AL RAYA	2.320	-0.90	-0.47	-0.39	-0.39	-12.62	0.88	15.09	4.31	21.57
MESAIEED PETRO	1.687	-0.12	0.54	2.55	2.55	-5.65	1.31	21.03	5.10	21.19
Oman										
BANK MUSCAT	0.253	0.40	0.40	0.80	0.80	-4.17	0.83	9.87	6.13	1.90
OMANTEL	1.000	0.00	-0.50	-1.48	-1.48	-5.66	1.22	11.29	6.00	0.75
BANK DHOFAR	0.160	0.00	0.00	-3.03	-3.03	0.00	0.67	15.87	4.84	0.48
NAT BANK OF OMAN	0.260	0.00	0.00	2.77	2.77	-7.14	0.63	9.10	3.27	0.42
OMINVEST	0.340	-0.87	-1.16	-4.23	-4.23	-13.99	0.72	7.39	5.88	0.23

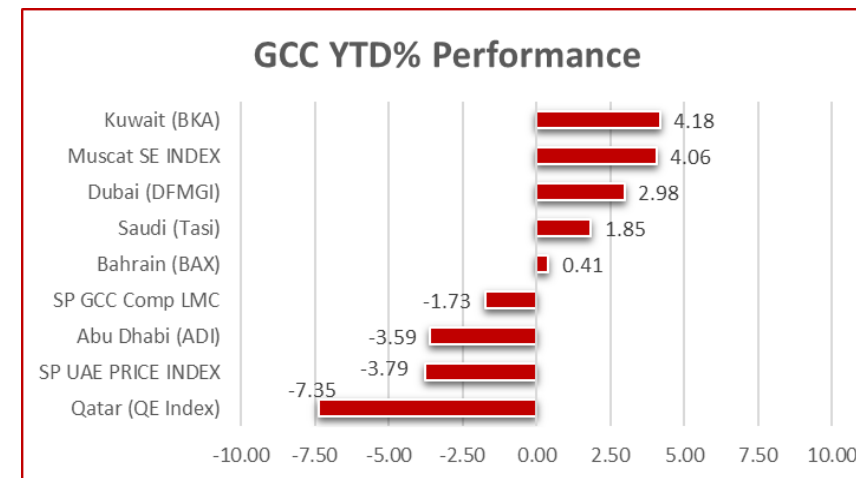
* GCC Markets performance at the latest close.

Foreign Holding									
Date	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUB	WARBA
10-July-24	24.45%	13.71%	0.06%	2.60%	6.30%	17.63%	12.96%	6.01%	5.60%
17-July-24	24.41%	13.88%	0.06%	2.77%	6.80%	17.61%	12.93%	6.01%	5.66%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Leading Sector, Security Performance

Kuwait

The market is down today by -0.21 % The leading sector bottom performance indices today are Insurance -5.46 % Telecom -0.27 % Basic materials -0.25 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.35 %, SABIC have positive performance today by + 0.38%, STC have negative performance today by -0.13 %, Al Rajhi Bank has a positive performance today by + 0.84 %.



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