

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 10th December 2024



DAILY MARKETS WRAP,

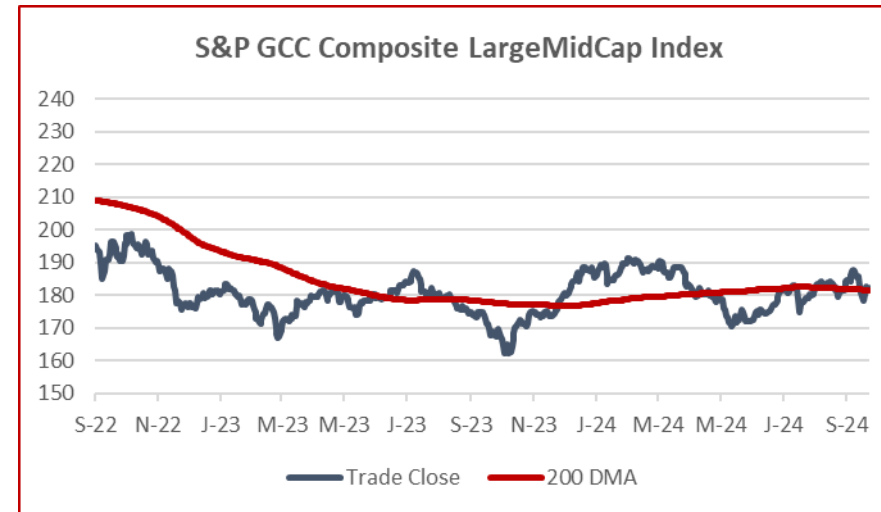
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,097.4	1.19	1.39	3.92	-1.05	1.09	3.02	23.10	3.03	10,301.45
Qatar (QE Index)	10,421.4	0.58	0.28	0.03	-1.82	-3.78	1.22	11.57	4.30	528.24
Dubai (DFMGI)	4,848.1	-0.13	-0.13	0.02	7.65	19.42	1.71	9.51	4.95	727.85
Abu Dhabi (ADI)	9,251.4	-0.16	-0.16	0.18	-1.85	-3.41	2.70	16.53	2.11	2,664.57
Bahrain (BAX)	2,029.0	-0.32	-0.32	-0.15	0.80	2.92	0.94	9.80	4.43	7.73
Muscat SE INDEX	4,553.1	0.11	-0.40	-0.22	-3.34	0.87	0.83	9.59	5.97	7.25
SP GCC Comp LMC	185.7	0.98	0.95	2.48	0.02	0.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.3	-0.38	-0.38	0.12	0.98	4.00				
Developed Markets										
MSCI World Index	3,837.6	-0.45	-0.45	0.72	3.08	21.09				
U.S. (S&P 500)	6,052.9	-0.61	-0.61	0.34	5.04	26.90	5.04	28.65	1.50	54,279.84
U.K. (FTSE 100)	8,352.1	0.52	0.52	0.78	1.40	8.00	1.72	15.84	3.66	2,160.52
Japan (topix)	2,734.6	0.27	0.27	2.01	3.35	15.56	1.43	14.43	2.28	958,945.37
Emerging Markets										
MSCI EM Index	1,114.0	0.81	0.81	3.29	-4.85	8.82				
China (SSE Composite)	3,402.5	-0.05	-0.05	2.29	1.98	14.37	1.36	12.00		44,025.04
India (Sensex)	81,508.5	-0.25	-0.25	2.14	-3.31	12.83	4.34	23.43	1.13	159,705.99

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,313.8	0.52	0.34	0.94	2.49	7.28	1.50	15.35	3.65	43.81
Kuwait Premier Index	7,835.7	0.56	0.35	0.91	1.65	4.80	1.60	16.29	3.48	35.63
Kuwait Main Index	6,677.0	0.36	0.28	1.04	6.38	19.88	1.17	11.98	4.50	8.18
Kuwait Sector										
Banking	1,793.1	0.68	0.56	1.03	2.28	8.84	1.77	17.26	3.07	26.68
Telecom	1,016.1	0.28	-0.05	0.90	-1.17	-8.06	1.48	12.57	8.30	3.10
Industrials	713.1	0.27	-0.14	0.84	-1.72	-21.46	0.80	11.52	6.22	2.41
Financial Services	1,495.6	0.80	1.23	2.17	6.02	23.38	1.22	12.42	2.78	4.96
Real Estate	1,392.2	-0.36	-0.75	0.18	1.20	14.78	1.07	15.86	2.05	2.96
Basic Materials	932.6	-1.17	-6.06	-0.94	15.52	25.02	1.70	12.21	9.28	0.53
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,018.6	0.81	0.61	4.72	1.47	54.66	2.19	20.59	2.03	0.31
Insurance	2,000.3	1.27	1.07	0.86	-4.01	-12.76	1.08	9.79	4.02	0.80
Consumer Discretionary	2,055.8	-0.29	-0.45	-2.31	13.81	28.17				
Energy	1,176.3	0.33	-1.00	-1.83	5.26	23.95	1.00	9.20	5.40	0.24
Technology	1,069.4	2.08	0.00	-2.00	-26.13	84.91	1.22			0.01
Utilities	423.7	0.62	-1.23	-1.83	8.78	-6.94				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased only slightly on Tuesday, holding on to most of their gains from the prior session as mounting geopolitical risk after the fall of Syrian President Bashar al-Assad and China's vow to ramp up policy stimulus kept a floor under prices. Brent crude futures were down 13 cents, or about 0.2%, at \$72.01 per barrel.

Kuwait Market

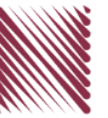
The market closed up by 0.52% at 7,313.8 value traded 75.6 million KD, Premier market value reached 47.1 million KD up by 0.56% at 7,835.7

KSA Market

The market closed up by 1.19% at 12,097.4.

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	0.882	0.34	0.00	1.38	-0.11	3.59	1.66	13.01	3.83	7.35
KFH	0.739	0.27	0.14	0.14	3.21	10.95	2.13	20.15	2.59	12.65
ZAIN	0.466	0.00	0.00	1.08	-1.89	-8.09	1.76	11.27	7.51	2.02
BOUBYAN BANK	0.566	3.66	3.66	3.47	-0.70	-0.01	2.29	27.38	1.33	2.38
AGILITY	0.266	0.38	-0.37	0.00	21.46	-6.08	0.69	11.10	7.52	0.71
Saudi Arabia										
ARAMCO	28.30	1.25	1.25	3.10	4.43	-14.24	4.60	16.70	6.81	6,849.33
SABIC	70.10	1.89	2.34	1.74	-6.41	-16.05	1.27	85.12	4.71	210.32
STC	40.10	-0.37	0.50	0.75	-8.24	1.91	2.52	15.74	3.99	200.52
AL-RAJHI BANK	94.20	4.09	3.18	3.40	8.03	8.90	3.20	21.53	2.55	376.84
NCB	34.10	-0.15	1.34	5.08	-0.58	-11.77	1.11	10.24	5.28	204.62
Abu Dhabi										
ETISALAT.AD	16.54	-0.48	-0.48	-0.12	-10.59	-15.78	3.33	12.99	4.93	143.85
FAB.AD	13.26	0.45	0.45	3.59	-3.49	-5.01	1.14	9.07	5.35	146.50
EMIRATES NBD	19.60	-0.25	-0.25	-2.00	-3.45	13.29	1.01	5.50	6.12	123.81
DB ISLAMIC DB	6.80	0.44	0.44	0.00	7.94	18.88	1.07	7.04	6.62	49.24
EMAR.DU	9.51	-1.96	-1.96	-0.42	9.06	20.08	1.04	7.05	5.26	84.06
Qatar										
QNB	17.100	1.30	-0.58	0.00	0.88	3.45	1.42	10.39	3.83	157.47
INDUSTREIS QAT	12.970	1.17	1.33	-0.08	-0.54	-0.84	2.13	14.69	5.40	78.24
QA ISLAMIC BK	20.830	-0.33	-0.48	-0.43	-2.44	-3.12	1.62	11.46	2.94	49.07
MASRAF AL RAYA	2.415	0.71	0.21	0.42	-2.23	-9.04	0.90	15.42	4.14	22.39
MESAEED PETRO	1.508	0.20	-0.13	-1.57	-7.48	-15.66	1.17	23.67	4.64	18.89
Oman										
BANK MUSCAT	0.254	0.00	-0.39	0.79	0.79	-3.79	0.79	9.47	6.10	1.91
OMANTEL	0.940	0.75	0.53	3.30	-4.76	-11.32	1.11	11.12	6.38	0.70
BANK DHOFAR	0.170	0.00	0.00	-3.95	8.28	6.25	0.69	19.06	4.56	0.51
NAT BANK OF OMAN	0.284	-1.39	-1.39	2.16	-2.07	1.43	0.66	9.69	2.99	0.46
OMINVEST	0.336	0.00	-1.75	-1.75	-4.55	-15.00	0.71	7.63	5.95	0.22

* GCC Markets performance at the latest close.

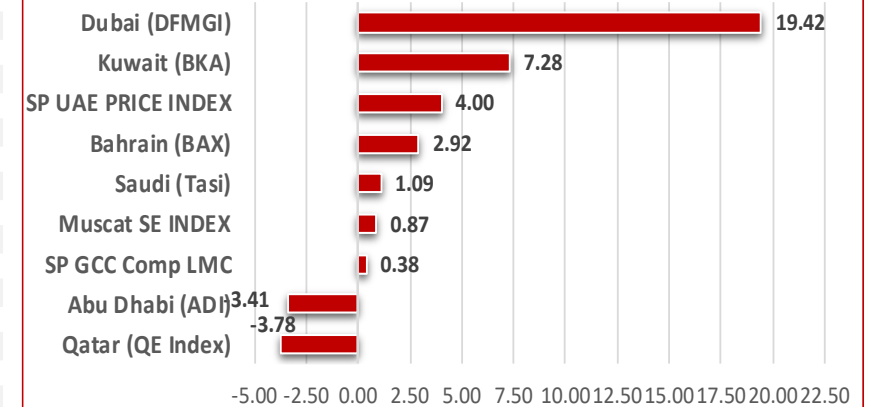
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
27-Nov. 24	24.68%	16.13%	0.06%	3.71%	8.31%	17.77%	13.20%	5.96%	6.02%
04-Dec. 24	24.58%	15.92%	0.06%	3.70%	8.34%	17.75%	13.20%	5.93%	6.11%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC

GCC YTD% Performance



* GCC Markets performance at the latest close.

Kuwait

The market is up today by +0.52 %, the leading sector best performance indices today is technology up by 2.08%.

KSA

Saudi Armco has a positive performance today up by 1.25%. SABIC has a positive performance today up by 1.89%, STC has negative performance today down by -0.37%, Al Rajhi Bank has positive performance by 4.09%.

UAE

ETISALAT.AD has negative performance today by -0.48%, FAB.AD has positive performance today by 0.45%



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