



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 11th December 2024



DAILY MARKETS WRAP,

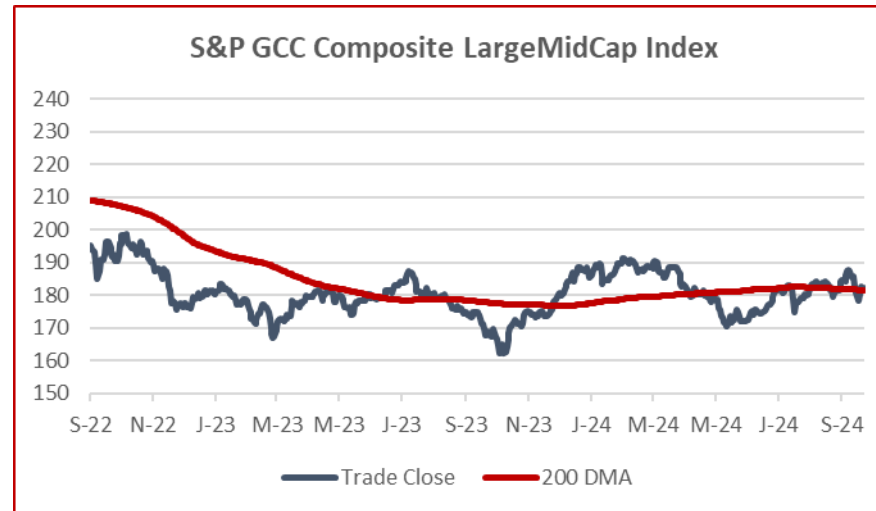
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,193.6	0.80	2.19	4.74	-0.27	1.89	3.02	23.10	3.04	10,418.86
Qatar (QE Index)	10,496.3	0.72	1.01	0.75	-1.11	-3.09	1.23	11.65	4.27	531.30
Dubai (DFMGI)	4,794.1	-1.11	-1.24	-1.10	6.45	18.09	1.69	9.40	5.01	718.23
Abu Dhabi (ADI)	9,249.9	-0.02	-0.18	0.16	-1.86	-3.42	2.70	16.52	2.11	2,662.46
Bahrain (BAX)	2,016.7	-0.60	-0.93	-0.75	0.20	2.29	0.94	9.73	4.46	7.68
Muscat SE INDEX	4,532.9	-0.45	-0.85	-0.66	-3.77	0.42	0.82	9.55	6.00	7.22
SP GCC Comp LMC	186.5	0.45	1.40	2.93	0.47	0.83	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.5	-0.56	-0.93	-0.43	0.41	3.42				
Developed Markets										
MSCI World Index	3,816.8	-0.54	-0.99	0.17	2.52	20.43				
U.S. (S&P 500)	6,034.9	-0.30	-0.91	0.04	4.73	26.52	5.01	28.47	1.51	53,931.50
U.K. (FTSE 100)	8,280.4	-0.86	-0.34	-0.08	0.53	7.07	1.71	15.71	3.71	2,141.65
Japan (topix)	2,741.4	0.25	0.52	2.26	3.61	15.85	1.43	14.46	2.27	961,036.11
Emerging Markets										
MSCI EM Index	1,111.7	-0.21	0.60	3.07	-5.05	8.59				
China (SSE Composite)	3,422.7	0.59	0.55	2.89	2.58	15.05	1.36	12.00		44,025.04
India (Sensex)	81,510.1	0.00	-0.24	2.14	-3.31	12.83	4.34	23.43	1.13	159,609.05

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,317.7	0.05	0.39	0.99	2.54	7.34	1.51	15.44	3.63	44.04
Kuwait Premier Index	7,846.0	0.13	0.48	1.05	1.78	4.93	1.61	16.38	3.46	35.83
Kuwait Main Index	6,657.7	-0.29	-0.01	0.74	6.07	19.53	1.18	12.04	4.48	8.21
Kuwait Sector										
Banking	1,790.5	-0.15	0.41	0.88	2.13	8.68	1.78	17.37	3.05	26.86
Telecom	1,026.0	0.98	0.93	1.88	-0.21	-7.16	1.49	12.61	8.27	3.10
Industrials	713.7	0.09	-0.05	0.93	-1.63	-21.39	0.80	11.56	6.20	2.42
Financial Services	1,500.7	0.34	1.58	2.52	6.38	23.80	1.23	12.54	2.76	5.00
Real Estate	1,401.2	0.64	-0.11	0.83	1.86	15.52	1.07	15.81	2.06	2.95
Basic Materials	940.3	0.82	-5.29	-0.13	16.47	26.05	1.68	12.07	9.39	0.53
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,021.3	0.27	0.88	5.00	1.74	55.08	2.21	20.76	2.02	0.31
Insurance	1,992.6	-0.38	0.68	0.47	-4.37	-13.09	1.09	9.92	3.97	0.81
Consumer Discretionary	2,044.6	-0.54	-0.99	-2.84	13.19	27.48				
Energy	1,178.4	0.17	-0.83	-1.66	5.44	24.17	1.00	9.23	5.39	0.24
Technology	1,069.4	0.00	0.00	-2.00	-26.13	84.91	1.24			0.01
Utilities	423.7	0.00	-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 rose slightly early on Wednesday, with market participants expecting to see demand rising in China next year after Beijing announced a looser monetary policy to stimulate economic growth. Brent crude futures gained 10 cents, or 0.14%, to \$72.29 a barrel.

Kuwait Market

The market closed up by 0.05% at 7,317.7 value traded 58.3 million KD, Premier market value reached 36.7 million KD up by 0.13% at 7,846.0

KSA Market

The market closed up by 0.80% at 12,193.6.

DAILY MARKETS WRAP,

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* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.874	-0.91	-0.91	0.46	-1.02	2.65	1.65	12.89	3.87	7.28
KFH	0.741	0.27	0.41	0.41	3.49	11.25	2.13	20.20	2.59	12.68
ZAIN	0.472	1.29	1.29	2.39	-0.63	-6.90	1.78	11.42	7.42	2.04
BOUBYAN BANK	0.568	0.35	4.03	3.84	-0.35	0.35	2.30	27.48	1.33	2.39
AGILITY	0.266	0.00	-0.37	0.00	21.46	-6.08	0.69	11.10	7.52	0.71
Saudi Arabia										
ARAMCO	28.65	1.24	2.50	4.37	5.72	-13.18	4.65	16.90	6.72	6,933.67
SABIC	70.10	0.00	2.34	1.74	-6.41	-16.05	1.27	85.12	4.71	210.31
STC	40.60	1.25	1.75	2.01	-7.09	3.19	2.55	15.94	3.94	203.01
AL-RAJHI BANK	94.60	0.42	3.61	3.84	8.49	9.36	3.21	21.62	2.54	378.42
NCB	34.45	1.03	2.38	6.16	0.44	-10.87	1.12	10.34	5.22	206.71
Abu Dhabi										
ETISALAT.AD	16.44	-0.60	-1.08	-0.72	-11.14	-16.29	3.31	12.91	4.96	142.97
FAB.AD	13.28	0.15	0.61	3.75	-3.35	-4.87	1.14	9.09	5.35	146.71
EMIRATES NBD	19.40	-1.02	-1.27	-3.00	-4.43	12.14	0.99	5.44	6.19	122.54
DB ISLAMIC DB	6.80	0.00	0.44	0.00	7.94	18.88	1.07	7.04	6.62	49.24
EMAR.DU	9.25	-2.73	-4.64	-3.14	6.08	16.79	1.02	6.86	5.41	81.76
Qatar										
QNB	17.200	0.58	0.00	0.58	1.47	4.05	1.42	10.45	3.81	159.34
INDUSTREIS QAT	13.040	0.54	1.87	0.46	0.00	-0.31	2.14	14.77	5.37	79.13
QA ISLAMIC BK	21.090	1.25	0.76	0.81	-1.22	-1.91	1.64	11.60	2.90	49.98
MASRAF AL RAYA	2.471	2.32	2.53	2.74	0.04	-6.93	0.92	15.78	4.05	23.05
MESAEED PETRO	1.508	0.00	-0.13	-1.57	-7.48	-15.66	1.17	23.67	4.64	19.00
Oman										
BANK MUSCAT	0.253	-0.39	-0.78	0.40	0.40	-4.17	0.79	9.44	6.13	1.90
OMANTEL	0.936	-0.43	0.11	2.86	-5.17	-11.70	1.11	11.07	6.41	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	0.282	-0.70	-2.08	1.44	-2.76	0.71	0.65	9.62	3.01	0.46
OMINVEST	0.338	0.60	-1.17	-1.17	-3.98	-14.49	0.72	7.68	5.92	0.23

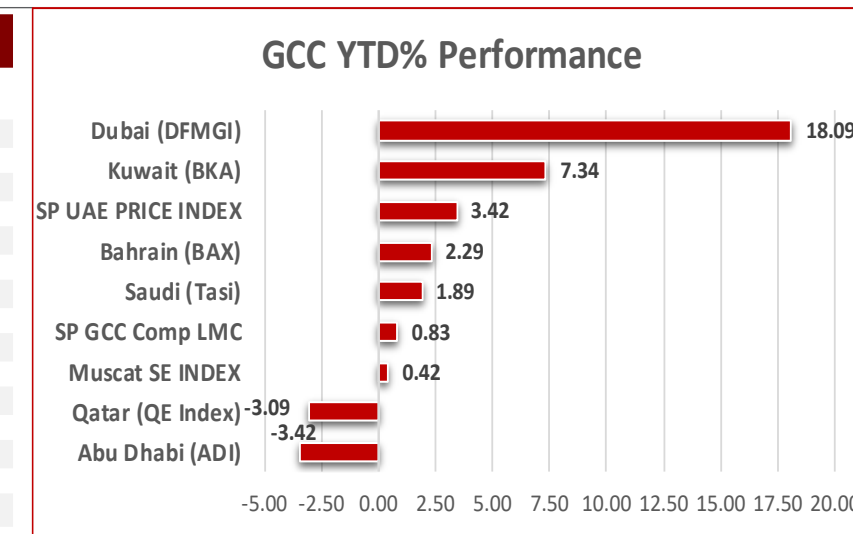
* GCC Markets performance at the latest close.

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 Markets performance at the latest close.

Kuwait

The market is up today by +0.05 %, the leading sector best performance indices today is telecom up by 0.98%.

KSA

Saudi Armco has a positive performance today up by 1.24%. SABIC has a flat performance today, STC has positive performance today up by +1.25%, Al Rajhi Bank has positive performance by 0.42%.

UAE

ETISALAT.AD has negative performance today by -0.60%, FAB.AD has positive performance today by 0.15%



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