

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

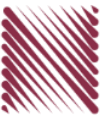
## GCC DAILY MORNING BRIEF

Thursday, 12<sup>th</sup> December 2024



# DAILY MARKETS WRAP,

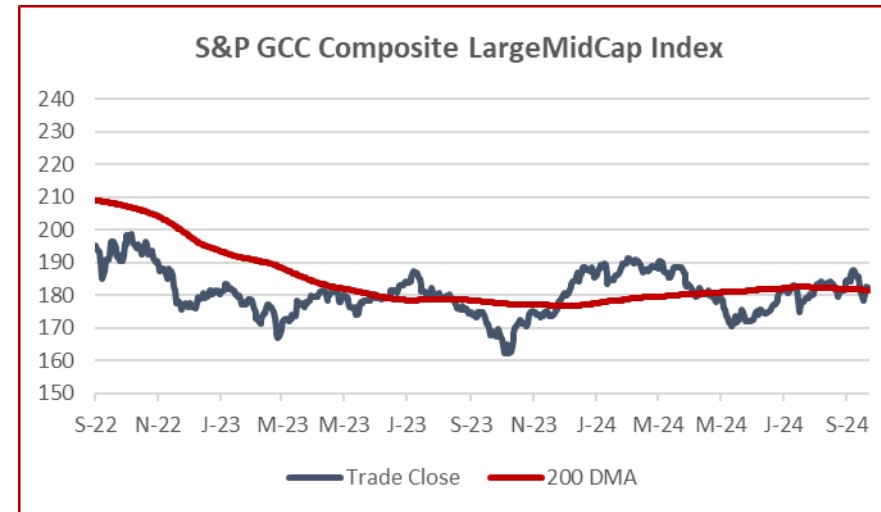
## NIC RESEARCH AND STUDIES DEP



| * Market Watch           | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)             | 12,149.2    | -0.36 | 1.82  | 4.36  | -0.63 | 1.52  |      | 20.49 | 3.37           | 10,381.05             |
| Qatar (QE Index)         | 10,510.9    | 0.14  | 1.15  | 0.89  | -0.97 | -2.95 | 1.23 | 11.68 | 4.26           | 532.96                |
| Dubai (DFMGI)            | 4,795.3     | 0.03  | -1.22 | -1.07 | 6.48  | 18.12 | 1.69 | 9.41  | 5.01           | 718.45                |
| Abu Dhabi (ADI)          | 9,270.6     | 0.22  | 0.05  | 0.39  | -1.64 | -3.21 | 2.70 | 16.56 | 2.11           | 2,671.36              |
| Bahrain (BAX)            | 2,011.9     | -0.24 | -1.16 | -0.99 | -0.04 | 2.05  | 0.94 | 9.71  | 4.46           | 7.66                  |
| Muscat SE INDEX          | 4,517.2     | -0.35 | -1.19 | -1.00 | -4.10 | 0.07  | 0.82 | 9.52  | 6.02           | 7.20                  |
| SP GCC Comp LMC          | 186.5       | 0.00  | 1.40  | 2.93  | 0.47  | 0.83  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 142.5       | 0.00  | -0.93 | -0.43 | 0.41  | 3.42  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| MSCI World Index         | 3,842.4     | 0.67  | -0.33 | 0.85  | 3.21  | 21.24 |      |       |                |                       |
| U.S. (S&P 500)           | 6,084.2     | 0.82  | -0.10 | 0.86  | 5.58  | 27.56 | 4.99 | 28.38 | 1.51           | 53,798.92             |
| U.K. (FTSE 100)          | 8,301.6     | 0.26  | -0.08 | 0.17  | 0.79  | 7.35  | 1.71 | 15.75 | 3.70           | 2,146.89              |
| Japan (topix)            | 2,749.3     | 0.29  | 0.81  | 2.56  | 3.91  | 16.18 | 1.44 | 14.51 | 2.26           | 963,504.68            |
| <b>Emerging Markets</b>  |             |       |       |       |       |       |      |       |                |                       |
| MSCI EM Index            | 1,108.4     | -0.30 | 0.30  | 2.77  | -5.33 | 8.27  |      |       |                |                       |
| China (SSE Composite)    | 3,432.5     | 0.29  | 0.83  | 3.19  | 2.88  | 15.38 | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 81,526.1    | 0.02  | -0.22 | 2.16  | -3.29 | 12.85 | 4.34 | 23.44 | 1.13           | 159,664.30            |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| Kuwait All Share Index | 7,325.5     | 0.11  | 0.50  | 1.10  | 2.65   | 7.46   | 1.51 | 15.44 | 3.63           | 44.06                 |
| Kuwait Premier Index   | 7,853.7     | 0.10  | 0.58  | 1.14  | 1.88   | 5.04   | 1.61 | 16.40 | 3.46           | 35.88                 |
| Kuwait Main Index      | 6,667.4     | 0.15  | 0.13  | 0.89  | 6.22   | 19.71  | 1.17 | 11.99 | 4.49           | 8.19                  |
| <b>Kuwait Sector</b>   |             |       |       |       |        |        |      |       |                |                       |
| Banking                | 1,793.0     | 0.14  | 0.55  | 1.03  | 2.27   | 8.83   | 1.78 | 17.35 | 3.05           | 26.82                 |
| Telecom                | 1,036.0     | 0.98  | 1.91  | 2.88  | 0.77   | -6.26  | 1.50 | 12.73 | 8.19           | 3.14                  |
| Industrials            | 713.6       | -0.02 | -0.07 | 0.91  | -1.65  | -21.40 | 0.80 | 11.56 | 6.20           | 2.42                  |
| Financial Services     | 1,502.7     | 0.14  | 1.71  | 2.66  | 6.53   | 23.97  | 1.23 | 12.58 | 2.75           | 5.01                  |
| Real Estate            | 1,394.9     | -0.45 | -0.55 | 0.37  | 1.40   | 15.00  | 1.08 | 15.92 | 2.04           | 2.97                  |
| Basic Materials        | 916.4       | -2.54 | -7.69 | -2.66 | 13.52  | 22.85  | 1.69 | 12.17 | 9.32           | 0.53                  |
| Health Care            | 468.2       | 0.00  | 0.00  | 0.00  | -0.54  | -2.90  | 1.57 | 15.09 | 2.24           |                       |
| Consumer Staples       | 1,042.5     | 2.08  | 2.98  | 7.18  | 3.86   | 58.30  | 2.22 | 20.81 | 2.01           | 0.31                  |
| Insurance              | 1,992.9     | 0.01  | 0.69  | 0.48  | -4.36  | -13.08 | 1.09 | 9.88  | 3.98           | 0.81                  |
| Consumer Discretionary | 2,033.4     | -0.55 | -1.53 | -3.37 | 12.58  | 26.78  |      |       |                |                       |
| Energy                 | 1,174.5     | -0.33 | -1.15 | -1.98 | 5.10   | 23.76  | 1.01 | 9.24  | 5.38           | 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 were little changed in early Asian trade on Thursday as forecasts of weak demand and a higher-than-expected rise in U.S. gasoline and distillate inventories stemmed gains from an additional round of European Union sanctions that threatened Russian oil flows. Brent crude futures were down 5 cents at \$73.47 a barrel at 0141 GMT. U.S. West Texas Intermediate crude futures fell 11 cents to \$70.18.

#### Kuwait Market

The market closed up by 0.11% at 7,325.5 value traded 64.5 million KD, Premier market value reached 31.8 million KD up by 0.10% at 7,853.7

#### KSA Market

The market closed down by 0.36% at 12,149.2.

# 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) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |        |        |      |       |                |                       |
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| NBK                    | 0.878       | 0.46  | -0.45 | 0.92  | -0.57  | 3.12   | 1.65 | 12.95 | 3.85           | 7.32                  |
| KFH                    | 0.741       | 0.00  | 0.41  | 0.41  | 3.49   | 11.25  | 2.13 | 20.20 | 2.59           | 12.69                 |
| ZAIN                   | 0.473       | 0.21  | 1.50  | 2.60  | -0.42  | -6.71  | 1.78 | 11.44 | 7.40           | 2.05                  |
| BOUBYAN BANK           | 0.568       | 0.00  | 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                  |
| <b>Saudi Arabia</b>    |             |       |       |       |        |        |      |       |                |                       |
| ARAMCO                 | 28.55       | -0.35 | 2.15  | 4.01  | 5.35   | -13.48 | 4.64 | 16.85 | 6.75           | 6,910.57              |
| SABIC                  | 69.50       | -0.86 | 1.46  | 0.87  | -7.21  | -16.77 | 1.26 | 84.39 | 4.75           | 208.54                |
| STC                    | 40.40       | -0.49 | 1.25  | 1.51  | -7.55  | 2.68   | 2.54 | 15.86 | 3.96           | 202.04                |
| AL-RAJHI BANK          | 94.20       | -0.42 | 3.18  | 3.40  | 8.03   | 8.90   | 3.20 | 21.53 | 2.55           | 376.88                |
| NCB                    | 34.30       | -0.44 | 1.93  | 5.70  | 0.00   | -11.25 | 1.11 | 10.30 | 5.25           | 205.84                |
| <b>Abu Dhabi</b>       |             |       |       |       |        |        |      |       |                |                       |
| ETISALAT.AD            | 16.50       | 0.36  | -0.72 | -0.36 | -10.81 | -15.99 | 3.32 | 12.96 | 4.94           | 143.51                |
| FAB.AD                 | 13.24       | -0.30 | 0.30  | 3.44  | -3.64  | -5.16  | 1.13 | 9.06  | 5.36           | 146.28                |
| EMIRATES NBD           | 19.50       | 0.52  | -0.76 | -2.50 | -3.94  | 12.72  | 1.00 | 5.47  | 6.15           | 123.18                |
| DB ISLAMIC DB          | 6.76        | -0.59 | -0.15 | -0.59 | 7.30   | 18.18  | 1.06 | 7.00  | 6.66           | 48.95                 |
| EMAR.DU                | 9.30        | 0.54  | -4.12 | -2.62 | 6.65   | 17.42  | 1.02 | 6.90  | 5.38           | 82.21                 |
| <b>Qatar</b>           |             |       |       |       |        |        |      |       |                |                       |
| QNB                    | 17.380      | 1.05  | 1.05  | 1.64  | 2.54   | 5.14   | 1.44 | 10.56 | 3.77           | 160.53                |
| INDUSTREIS QAT         | 13.010      | -0.23 | 1.64  | 0.23  | -0.23  | -0.54  | 2.13 | 14.74 | 5.38           | 78.71                 |
| QA ISLAMIC BK          | 20.880      | -1.00 | -0.24 | -0.19 | -2.20  | -2.88  | 1.63 | 11.48 | 2.93           | 49.34                 |
| MASRAF AL RAYA         | 2.484       | 0.53  | 3.07  | 3.28  | 0.57   | -6.44  | 0.92 | 15.86 | 4.03           | 23.10                 |
| MESAEED PETRO          | 1.515       | 0.46  | 0.33  | -1.11 | -7.06  | -15.27 | 1.17 | 23.78 | 4.62           | 19.03                 |
| <b>Oman</b>            |             |       |       |       |        |        |      |       |                |                       |
| BANK MUSCAT            | 0.253       | 0.00  | -0.78 | 0.40  | 0.40   | -4.17  | 0.79 | 9.44  | 6.13           | 1.90                  |
| OMANTEL                | 0.930       | -0.64 | -0.53 | 2.20  | -5.78  | -12.26 | 1.10 | 11.00 | 6.45           | 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       | 0.00  | -2.08 | 1.44  | -2.76  | 0.71   | 0.65 | 9.62  | 3.01           | 0.46                  |
| OMINVEST               | 0.335       | -0.89 | -2.05 | -2.05 | -4.83  | -15.25 | 0.71 | 7.61  | 5.97           | 0.22                  |

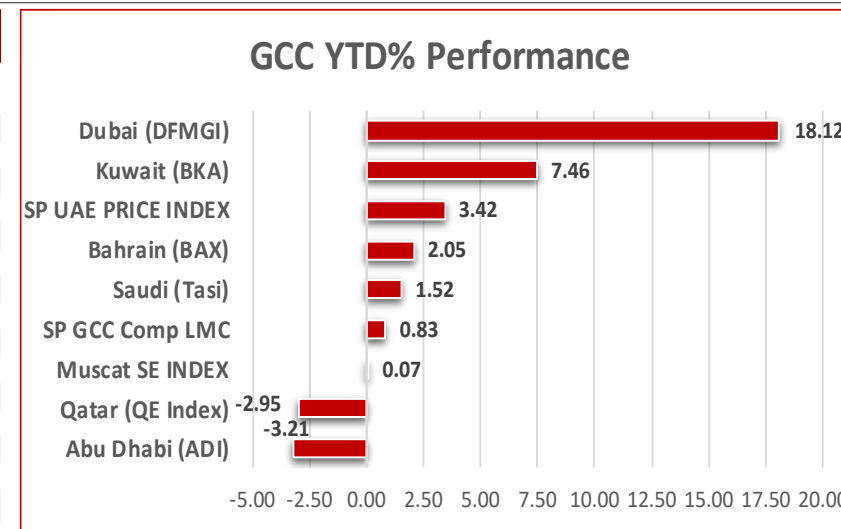
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 04-Dec. 24      | 24.58% | 15.92% | 0.06% | 3.70% | 8.34% | 17.75% | 13.20% | 5.93%   | 6.11% |
| 11-Dec. 24      | 24.62% | 15.98% | 0.06% | 3.71% | 8.51% | 17.80% | 13.22% | 5.96%   | 6.12% |

### 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 +0.11%, the leading sector index today is consumer staples up by 2.08%.

### KSA

Saudi Armco has a negative performance today down by -0.35%. SABIC has a negative performance today down by -0.86%, STC has negative performance today down by -0.49%, Al Rajhi Bank has negative performance by -0.42%.

### UAE

ETISALAT.AD has positive performance today by 0.36%, FAB.AD has negative performance today by -0.30%



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