

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

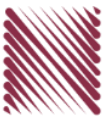
GCC DAILY MORNING BRIEF

Sunday, 15th December 2024



DAILY MARKETS WRAP,

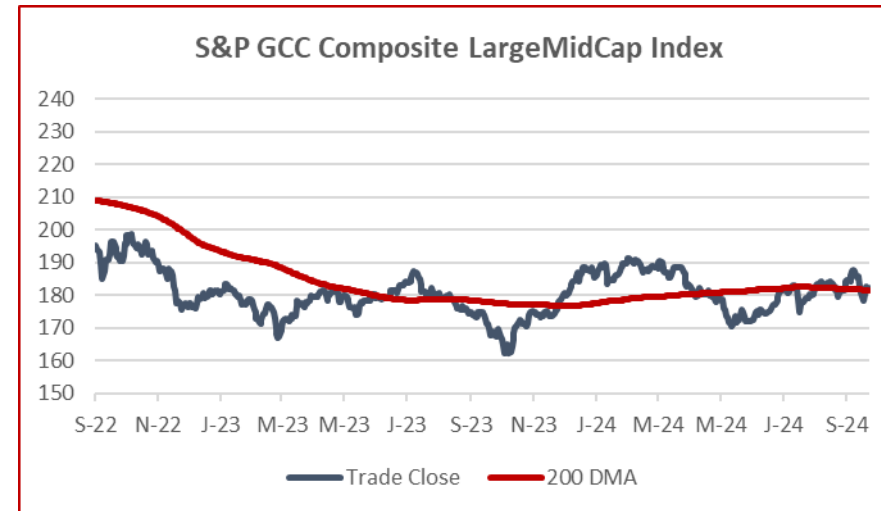
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,099.3	-0.41	1.40	3.93	-1.04	1.10	2.40	20.38	3.39	10,341.53
Qatar (QE Index)	10,528.7	0.17	1.32	1.06	-0.80	-2.79	1.23	11.69	4.25	533.32
Dubai (DFMGI)	4,829.6	0.37	-0.51	-0.37	7.24	18.96	1.70	9.50	4.96	722.07
Abu Dhabi (ADI)	9,265.1	-0.11	-0.01	0.33	-1.70	-3.27	2.70	16.55	2.11	2,668.31
Bahrain (BAX)	2,005.8	-0.30	-1.46	-1.29	-0.34	1.74	0.93	9.67	4.48	7.64
Muscat SE INDEX	4,545.9	0.64	-0.56	-0.38	-3.49	0.71	0.83	9.57	5.99	7.23
SP GCC Comp LMC	185.8	0.00	1.00	2.53	0.08	0.44	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.5	0.08	-0.24	0.26	1.12	4.14				
Developed Markets										
MSCI World Index	3,817.2	-0.23	-0.98	0.19	2.53	20.45				
U.S. (S&P 500)	6,051.1	0.00	-0.64	0.31	5.01	26.86	4.99	28.46	1.52	53,955.89
U.K. (FTSE 100)	8,300.3	-0.14	-0.10	0.16	0.77	7.33	1.70	15.77	3.70	2,144.90
Japan (topix)	2,746.6	-0.95	0.71	2.46	3.80	16.07	1.44	14.49	2.27	962,761.08
Emerging Markets										
MSCI EM Index	1,107.0	-0.53	0.18	2.64	-5.45	8.13				
China (SSE Composite)	3,391.9	-2.01	-0.36	1.97	1.66	14.02	1.36	12.00		44,025.04
India (Sensex)	82,133.1	1.04	0.52	2.92	-2.57	13.69	4.37	23.61	1.12	160,913.24

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,331.0	0.07	0.57	1.17	2.73	7.54	1.51	15.47	3.62	44.14
Kuwait Premier Index	7,859.7	0.08	0.66	1.22	1.96	5.12	1.62	16.43	3.45	35.93
Kuwait Main Index	6,672.1	0.07	0.20	0.96	6.30	19.79	1.18	12.02	4.47	8.21
Kuwait Sector										
Banking	1,795.0	0.11	0.67	1.14	2.39	8.96	1.78	17.39	3.05	26.89
Telecom	1,040.9	0.47	2.39	3.36	1.24	-5.82	1.52	12.92	8.08	3.18
Industrials	713.4	-0.02	-0.09	0.89	-1.67	-21.42	0.80	11.56	6.19	2.42
Financial Services	1,500.9	-0.12	1.59	2.53	6.40	23.81	1.23	12.58	2.75	5.01
Real Estate	1,396.1	0.09	-0.47	0.46	1.49	15.11	1.07	15.87	2.04	2.96
Basic Materials	935.2	2.05	-5.80	-0.67	15.84	25.37	1.68	12.10	9.37	0.53
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,017.2	-2.43	0.47	4.58	1.33	54.45	2.21	20.73	2.02	0.31
Insurance	2,000.1	0.36	1.06	0.85	-4.01	-12.77	1.09	9.92	3.97	0.81
Consumer Discretionary	2,016.7	-0.82	-2.34	-4.17	11.65	25.74				
Energy	1,172.4	-0.18	-1.33	-2.16	4.91	23.54	1.00	9.17	5.40	0.24
Technology	1,062.2	-0.68	-0.68	-2.67	-26.63	83.65	1.23			0.01
Utilities	418.4	-1.24	-2.45	-3.05	7.43	-8.09				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices climbed about 2% on Friday to settle at a three-week high, on expectations that additional sanctions on Russia and Iran could tighten supplies and that lower interest rates in Europe and the U.S. could boost fuel demand. Brent futures rose \$1.08, or 1.5%, to settle at \$74.49 a barrel.

Kuwait Market

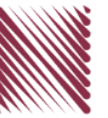
The market closed up by 0.07% at 7,331.0 value traded 71.8 million KD, Premier market value reached 34.5 million KD up by 0.08% at 7,859.7

KSA Market

The market closed down by 0.41% at 12,099.3

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	0.880	0.23	-0.23	1.15	-0.34	3.36	1.66	12.98	3.84	7.33
KFH	0.741	0.00	0.41	0.41	3.49	11.25	2.13	20.20	2.59	12.68
ZAIN	0.477	0.85	2.36	3.47	0.42	-5.92	1.80	11.54	7.34	2.06
BOUBYAN BANK	0.568	0.00	4.03	3.84	-0.35	0.35	2.30	27.48	1.33	2.39
AGILITY	0.264	-0.75	-1.12	-0.75	20.55	-6.79	0.69	11.02	7.58	0.71
Saudi Arabia										
ARAMCO	28.45	-0.35	1.79	3.64	4.98	-13.79	4.62	16.79	6.77	6,884.90
SABIC	68.70	-1.15	0.29	-0.29	-8.28	-17.72	1.25	83.42	4.80	206.10
STC	40.90	1.24	2.51	2.76	-6.41	3.95	2.57	16.06	3.91	204.50
AL-RAJHI BANK	93.10	-1.17	1.97	2.20	6.77	7.63	3.16	21.28	2.58	372.40
NCB	34.10	-0.58	1.34	5.08	-0.58	-11.77	1.11	10.24	5.28	204.60
Abu Dhabi										
ETISALAT.AD	16.44	-0.85	-1.93	-1.57	-11.89	-17.01	3.28	12.80	5.00	141.76
FAB.AD	13.26	-1.36	-0.91	2.19	-4.80	-6.30	1.12	8.95	5.43	144.50
EMIRATES NBD	19.80	0.51	0.76	-1.00	-2.46	14.45	1.02	5.55	6.06	125.07
DB ISLAMIC DB	6.78	-0.29	0.15	-0.29	7.62	18.53	1.06	7.02	6.64	49.09
EMAR.DU	9.59	1.48	-1.13	0.42	9.98	21.09	1.05	7.11	5.21	84.76
Qatar										
QNB	17.320	-0.35	0.70	1.29	2.18	4.78	1.43	10.53	3.78	159.97
INDUSTREIS QAT	12.990	-0.15	1.48	0.08	-0.38	-0.69	2.13	14.71	5.39	78.59
QA ISLAMIC BK	20.950	0.34	0.10	0.14	-1.87	-2.56	1.63	11.52	2.92	49.50
MASRAF AL RAYA	2.500	0.64	3.73	3.95	1.21	-5.84	0.93	15.97	4.00	23.25
MESAEED PETRO	1.528	0.86	1.19	-0.26	-6.26	-14.54	1.18	23.98	4.58	19.20
Oman										
BANK MUSCAT	0.252	-0.40	-1.18	0.00	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.929	-0.11	-0.64	2.09	-5.88	-12.36	1.10	10.99	6.46	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	0.295	4.61	2.43	6.12	1.72	5.36	0.68	10.06	2.88	0.48
OMINVEST	0.335	0.00	-2.05	-2.05	-4.83	-15.25	0.71	7.61	5.97	0.22

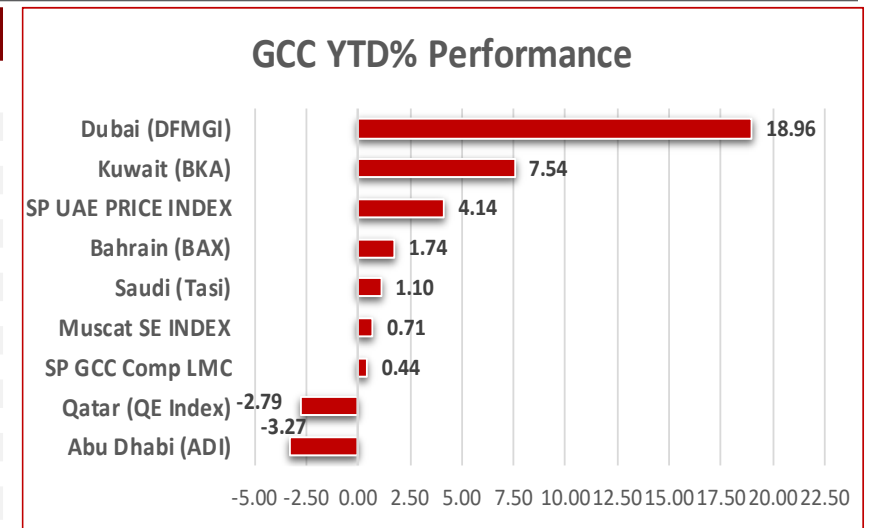
* GCC Markets performance at the latest close.

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 +0.07%, the leading sector index today is basic materials up by 2.05%.

KSA

Saudi Armco has a negative performance today down by -0.35%. SABIC has a negative performance today down by -1.15%, STC has positive performance today down by 1.24%, Al Rajhi Bank has negative performance by -1.17%.

UAE

ETISALAT.AD has negative performance today by -0.85%, FAB.AD has negative performance today by -1.36%



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