



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 16th December 2024



DAILY MARKETS WRAP,

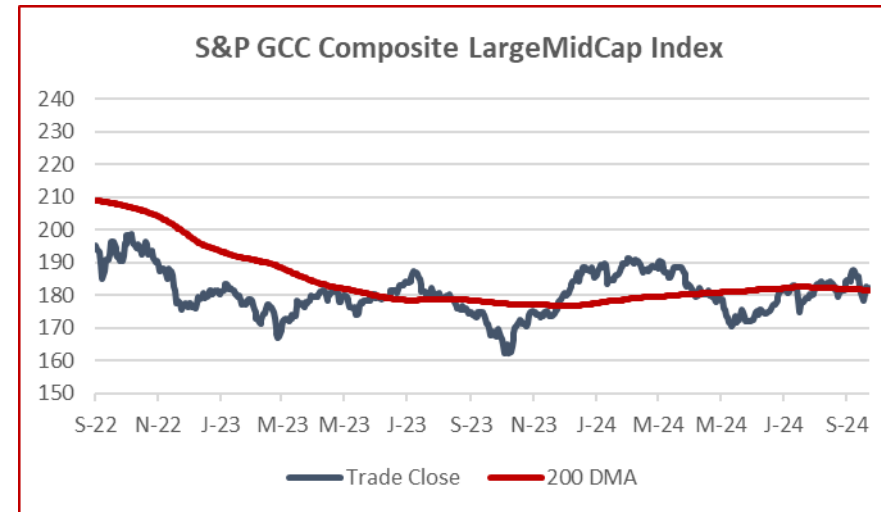
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,059.5	-0.33	-0.33	3.59	-1.36	0.77	2.38	20.13	3.40	10,308.59
Qatar (QE Index)	10,538.2	0.09	0.09	1.16	-0.71	-2.70	1.23	11.70	4.25	533.52
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)	2,008.3	0.12	0.12	-1.17	-0.22	1.86	0.93	9.68	4.48	7.65
Muscat SE INDEX	4,514.7	-0.69	-0.69	-1.06	-4.15	0.01	0.82	9.51	6.02	7.19
SP GCC Comp LMC	185.3	-0.28	-0.28	2.25	-0.19	0.16	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.5	0.00	0.00	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	7,311.5	-0.27	-0.27	0.90	2.46	7.25	1.51	15.47	3.62	44.14
Kuwait Premier Index	7,835.4	-0.31	-0.31	0.91	1.64	4.79	1.62	16.43	3.45	35.93
Kuwait Main Index	6,667.0	-0.08	-0.08	0.89	6.22	19.70	1.18	12.02	4.47	8.21
Kuwait Sector										
Banking	1,787.9	-0.40	-0.40	0.74	1.98	8.53	1.78	17.39	3.05	26.89
Telecom	1,031.4	-0.91	-0.91	2.42	0.32	-6.67	1.52	12.92	8.08	3.18
Industrials	711.7	-0.24	-0.24	0.64	-1.91	-21.61	0.80	11.56	6.19	2.42
Financial Services	1,513.2	0.82	0.82	3.37	7.27	24.83	1.23	12.58	2.75	5.01
Real Estate	1,396.9	0.06	0.06	0.52	1.55	15.17	1.07	15.87	2.04	2.96
Basic Materials	918.8	-1.75	-1.75	-2.41	13.81	23.17	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	1,036.0	1.85	1.85	6.51	3.21	57.31	2.21	20.73	2.02	0.31
Insurance	2,004.8	0.24	0.24	1.09	-3.79	-12.56	1.09	9.92	3.97	0.81
Consumer Discretionary	2,006.0	-0.53	-0.53	-4.67	11.06	25.07				
Energy	1,154.8	-1.50	-1.50	-3.63	3.33	21.68	1.00	9.17	5.40	0.24
Technology	1,025.8	-3.43	-3.43	-6.00	-29.15	77.36	1.23			0.01
Utilities	405.3	-3.15	-3.15	-6.10	4.05	-10.98				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil futures eased from their highest levels in weeks as investors awaited a meeting of the Federal Reserve later this week for indication of further rate cuts. Falls were limited however by concerns of supply disruptions in the event of more U.S. sanctions on major suppliers Russia and Iran. Brent crude futures fell 21 cents, or 0.3%, to \$74.28 a barrel.

Kuwait Market

The market closed down by -0.27% at 7,311.5 value traded 77.3 million KD, Premier market value reached 41.0 million KD down by -0.31% at 7,835.4

KSA Market

The market closed down by -0.33% at 12,059.5

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	0.877	-0.34	-0.34	0.80	-0.68	3.00	1.65	12.93	3.86	7.30
KFH	0.740	-0.13	-0.13	0.27	3.35	11.10	2.13	20.17	2.59	12.66
ZAIN	0.475	-0.42	-0.42	3.04	0.00	-6.31	1.79	11.49	7.37	2.06
BOUBYAN BANK	0.565	-0.53	-0.53	3.29	-0.88	-0.18	2.28	27.33	1.34	2.37
AGILITY	0.264	0.00	0.00	-0.75	20.55	-6.79	0.69	11.02	7.58	0.71
Saudi Arabia										
ARAMCO	28.45	0.00	0.00	3.64	4.98	-13.79	4.62	16.79	6.77	6,883.25
SABIC	68.80	0.15	0.15	-0.15	-8.14	-17.60	1.25	83.54	4.80	206.35
STC	40.90	0.00	0.00	2.76	-6.41	3.95	2.57	16.06	3.91	204.45
AL-RAJHI BANK	92.80	-0.32	-0.32	1.87	6.42	7.28	3.15	21.21	2.59	371.11
NCB	33.90	-0.59	-0.59	4.47	-1.17	-12.29	1.10	10.18	5.31	203.35
Abu Dhabi										
ETISALAT.AD	16.30	-0.85	-1.93	-1.57	-11.89	-17.01	3.28	12.80	5.00	141.76
FAB.AD	13.08	-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	17.280	-0.23	-0.23	1.05	1.95	4.54	1.43	10.50	3.79	159.65
INDUSTREIS QAT	12.990	0.00	0.00	0.08	-0.38	-0.69	2.13	14.71	5.39	78.61
QA ISLAMIC BK	20.970	0.10	0.10	0.24	-1.78	-2.47	1.63	11.53	2.92	49.56
MASRAF AL RAYA	2.498	-0.08	-0.08	3.87	1.13	-5.91	0.93	15.95	4.00	23.24
MESAEED PETRO	1.538	0.65	0.65	0.39	-5.64	-13.98	1.19	24.14	4.55	19.33
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.00	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.928	-0.11	-0.11	1.98	-5.98	-12.45	1.10	10.98	6.47	0.70
BANK DHOFAR	0.162	-4.71	-4.71	-8.47	3.18	1.25	0.66	18.16	4.78	0.49
NAT BANK OF OMAN	0.296	0.34	0.34	6.47	2.07	5.71	0.69	10.10	2.87	0.48
OMINVEST	0.337	0.60	0.60	-1.46	-4.26	-14.75	0.71	7.66	5.93	0.23

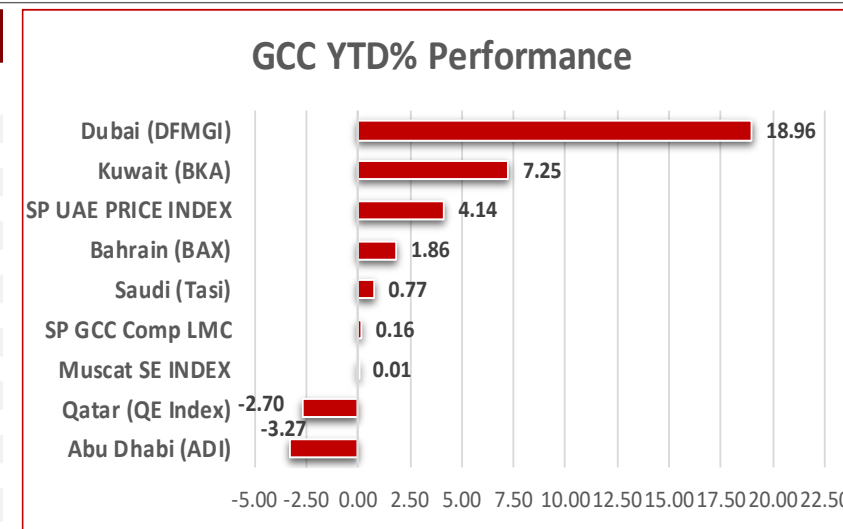
* GCC Markets performance at the latest close.

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 down today by -0.27%, the leading sector index today is consumer staples up by 1.85%.

KSA

Saudi Armco had a flat performance today. SABIC has a positive performance today down by 0.15%, STC had a flat performance today, Al Rajhi Bank has negative performance by -0.32%.

UAE

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



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