



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

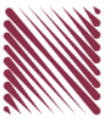
GCC DAILY MORNING BRIEF

Tuesday, 17th December 2024



DAILY MARKETS WRAP,

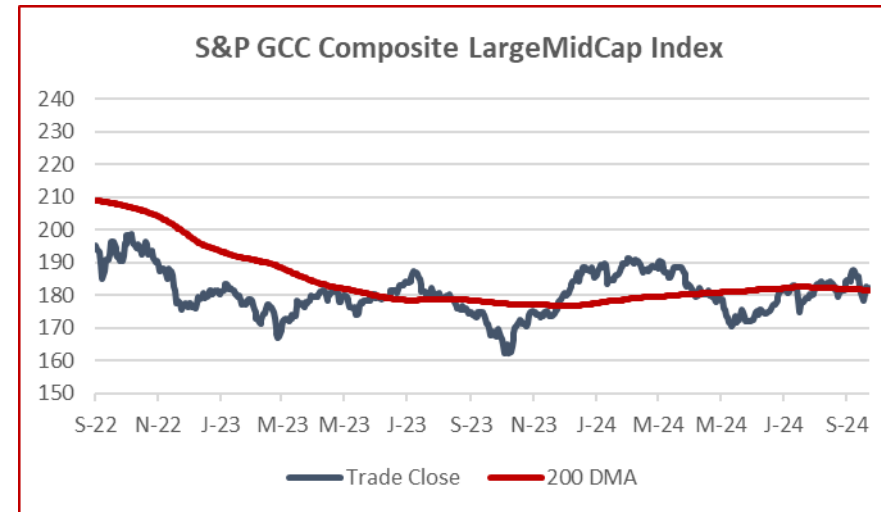
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,096.7	0.31	-0.02	3.91	-1.06	1.08	2.38	20.18	3.39	10,329.45
Qatar (QE Index)	10,578.2	0.38	0.47	1.54	-0.34	-2.33	1.24	11.74	4.24	535.29
Dubai (DFMGI)	5,047.5	4.51	4.51	4.13	12.08	24.33	1.78	9.95	4.73	759.13
Abu Dhabi (ADI)	9,280.2	0.16	0.16	0.49	-1.54	-3.11	2.71	16.59	2.11	2,663.83
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	4,521.1	0.14	-0.55	-0.92	-4.02	0.16	0.82	9.51	6.02	7.19
SP GCC Comp LMC	186.9	0.88	0.60	3.15	0.69	1.05	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	147.9	3.07	3.07	3.34	4.22	7.34				
Developed Markets										
MSCI World Index	3,827.0	0.26	0.26	0.44	2.79	20.76				
U.S. (S&P 500)	6,074.1	0.38	0.38	0.69	5.41	27.34	4.99	28.44	1.52	53,891.20
U.K. (FTSE 100)	8,262.1	-0.46	-0.46	-0.30	0.30	6.84	1.70	15.73	3.72	2,134.73
Japan (topix)	2,738.3	-0.30	-0.30	2.15	3.49	15.72	1.43	14.45	2.27	959,969.42
Emerging Markets										
MSCI EM Index	1,103.2	-0.34	-0.34	2.28	-5.78	7.76				
China (SSE Composite)	3,386.3	-0.16	-0.16	1.80	1.49	13.83	1.36	12.00		44,025.04
India (Sensex)	81,748.6	-0.47	-0.47	2.44	-3.03	13.16	4.35	23.50	1.13	159,993.34

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,294.0	-0.24	-0.50	0.66	2.21	6.99	1.51	15.43	3.63	44.02
Kuwait Premier Index	7,807.8	-0.35	-0.66	0.55	1.28	4.42	1.61	16.38	3.46	35.83
Kuwait Main Index	6,684.4	0.26	0.18	1.15	6.50	20.01	1.18	12.01	4.48	8.20
Kuwait Sector										
Banking	1,784.0	-0.22	-0.62	0.52	1.76	8.29	1.78	17.32	3.06	26.78
Telecom	1,023.9	-0.73	-1.63	1.68	-0.41	-7.35	1.51	12.80	8.15	3.15
Industrials	708.9	-0.39	-0.63	0.25	-2.30	-21.92	0.80	11.53	6.21	2.41
Financial Services	1,510.5	-0.18	0.64	3.19	7.08	24.60	1.24	12.70	2.73	5.05
Real Estate	1,388.9	-0.57	-0.52	-0.06	0.97	14.51	1.07	15.90	2.04	2.96
Basic Materials	936.0	1.88	0.09	-0.58	15.95	25.48	1.65	11.89	9.53	0.52
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,027.1	-0.86	0.98	5.60	2.32	55.96	2.25	21.11	1.98	0.31
Insurance	2,007.4	0.13	0.36	1.22	-3.66	-12.45	1.09	9.94	3.96	0.81
Consumer Discretionary	2,006.9	0.04	-0.49	-4.63	11.10	25.12				
Energy	1,176.3	1.86	0.33	-1.84	5.25	23.94	0.99	9.00	5.49	0.23
Technology	1,004.0	-2.13	-5.48	-8.00	-30.65	73.59	1.19			0.01
Utilities	405.3	0.00	-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 slipped from the highest levels in several weeks on Monday on weakness in consumer spending in China, the world's largest oil importer, and as investors paused buying ahead of the U.S. Federal Reserve's interest rate decision. Brent crude futures settled at \$73.91 a barrel, down 58 cents, or 0.8% lower, after settling on Friday at their highest since Nov. 22. U.S. West Texas Intermediate crude settled at \$70.71 a barrel.

Kuwait Market

The market closed down by -0.24% at 7,294.0 value traded 75.5 million KD, Premier market value reached 45.3 million KD down by -0.35% at 7,807.8

KSA Market

The market closed up by 0.31% at 12,096.7

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	0.872	-0.57	-0.91	0.23	-1.25	2.42	1.64	12.86	3.88	7.25
KFH	0.740	0.00	-0.13	0.27	3.35	11.10	2.13	20.17	2.59	12.65
ZAIN	0.472	-0.63	-1.05	2.39	-0.63	-6.90	1.78	11.42	7.42	2.04
BOUBYAN BANK	0.564	-0.18	-0.70	3.11	-1.05	-0.36	2.28	27.29	1.34	2.37
AGILITY	0.259	-1.89	-1.89	-2.63	18.26	-8.55	0.68	10.81	7.72	0.69
Saudi Arabia										
ARAMCO	28.50	0.18	0.18	3.83	5.17	-13.64	4.63	16.82	6.76	6,898.29
SABIC	68.80	0.00	0.15	-0.15	-8.14	-17.60	1.25	83.54	4.80	206.44
STC	40.70	-0.49	-0.49	2.26	-6.86	3.44	2.56	15.98	3.93	203.54
AL-RAJHI BANK	93.50	0.75	0.43	2.63	7.22	8.09	3.18	21.37	2.57	374.07
NCB	33.70	-0.59	-1.17	3.85	-1.75	-12.81	1.09	10.12	5.34	202.24
Abu Dhabi										
ETISALAT.AD	16.14	-0.98	-0.98	-2.54	-12.76	-17.82	3.25	12.68	5.05	140.37
FAB.AD	13.20	0.92	0.92	3.12	-3.93	-5.44	1.13	9.03	5.38	145.83
EMIRATES NBD	21.65	9.34	9.34	8.25	6.65	25.14	1.11	6.07	5.54	136.75
DB ISLAMIC DB	7.13	5.16	5.16	4.85	13.17	24.65	1.12	7.39	6.31	51.63
EMAR.DU	11.00	14.70	14.70	15.18	26.15	38.89	1.21	8.16	4.55	97.23
Qatar										
QNB	17.280	0.00	-0.23	1.05	1.95	4.54	1.43	10.50	3.79	159.61
INDUSTREIS QAT	13.260	2.08	2.08	2.16	1.69	1.38	2.18	15.02	5.28	80.22
QA ISLAMIC BK	21.090	0.57	0.67	0.81	-1.22	-1.91	1.64	11.60	2.90	49.83
MASRAF AL RAYA	2.500	0.08	0.00	3.95	1.21	-5.84	0.93	15.97	4.00	23.25
MESAEED PETRO	1.537	-0.07	0.59	0.33	-5.71	-14.04	1.19	24.12	4.55	19.31
Oman										
BANK MUSCAT	0.25	-0.79	-0.79	-0.79	-0.79	-5.30	0.78	9.32	6.20	1.88
OMANTEL	0.930	0.22	0.11	2.20	-5.78	-12.26	1.10	11.00	6.45	0.70
BANK DHOFAR	0.162	0.00	-4.71	-8.47	3.18	1.25	0.66	18.16	4.78	0.49
NAT BANK OF OMAN	0.296	0.00	0.34	6.47	2.07	5.71	0.69	10.10	2.87	0.48
OMINVEST	0.335	-0.59	0.00	-2.05	-4.83	-15.25	0.71	7.61	5.97	0.22

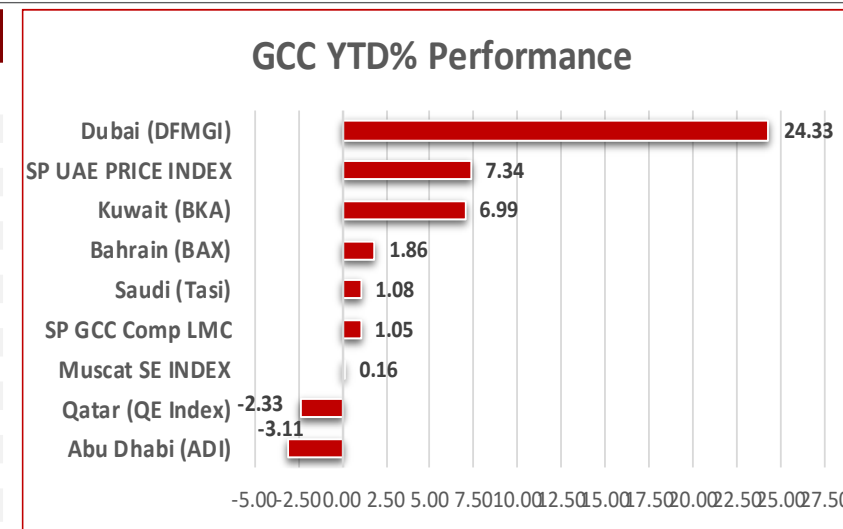
* GCC Markets performance at the latest close.

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



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Kuwait

The market is down today by -0.24%, the leading sector index today is basic materials up by 1.88%.

KSA

Saudi Armco had a positive performance today up by 0.18%. SABIC had a flat performance today ,STC had a negative performance today down by -0.49%, Al Rajhi Bank has positive performance by 0.75%.

UAE

ETISALAT.AD has negative performance today by -0.98%, FAB.AD has positive performance today by 0.92%



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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