

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

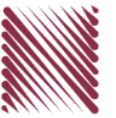
GCC DAILY MORNING BRIEF

Monday, 23rd December 2024



DAILY MARKETS WRAP,

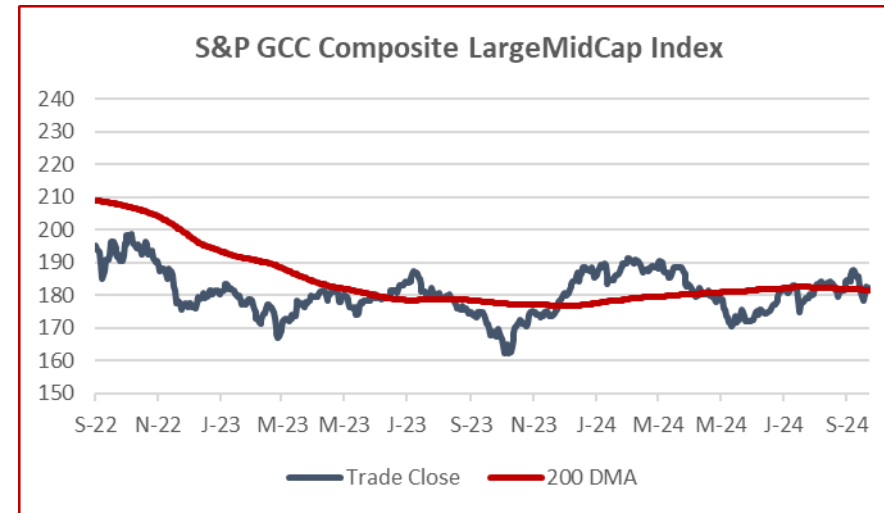
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,849.4	-0.36	-0.36	1.79	-3.08	-0.99	2.33	19.73	3.47	10,234.28
Qatar (QE Index)	10,558.9	0.96	0.96	1.35	-0.52	-2.51	1.24	11.72	4.24	534.39
Dubai (DFMGI)	5,057.3	0.21	4.71	4.33	12.30	24.57	1.82	10.16	4.62	764.06
Abu Dhabi (ADI)	9,351.3	0.84	0.93	1.26	-0.79	-2.37	2.73	16.72	2.09	2,686.63
Bahrain (BAX)	1,994.0	-0.33	-0.33	-1.87	-0.93	1.14	0.93	9.60	4.51	7.59
Muscat SE INDEX	4,488.4	-0.45	-0.45	-1.64	-4.71	-0.57	0.82	9.48	6.04	7.17
SP GCC Comp LMC	184.7	-0.02	-0.02	1.96	-0.48	-0.12	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	149.2	0.00	0.00	4.19	5.07	8.22				
Developed Markets										
MSCI World Index	3,723.2	0.74	-2.46	-2.28	0.01	17.48				
U.S. (S&P 500)	5,930.9	1.09	-1.99	-1.68	2.92	24.34	4.88	27.82	1.55	52,862.86
U.K. (FTSE 100)	8,084.6	-0.26	-2.60	-2.45	-1.85	4.54	1.67	15.45	3.78	2,094.09
Japan (topix)	2,702.0	-0.44	-1.62	0.79	2.12	14.18	1.41	14.26	2.30	948,594.73
Emerging Markets										
MSCI EM Index	1,072.2	-0.88	-3.14	-0.59	-8.42	4.74				
China (SSE Composite)	3,368.1	-0.06	-0.70	1.25	0.95	13.21	1.36	12.00		44,025.04
India (Sensex)	78,041.6	-1.49	-4.98	-2.21	-7.42	8.03	4.16	22.43	1.18	152,760.81

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,291.0	0.17	0.17	0.62	2.17	6.95	1.50	15.36	3.65	43.83
Kuwait Premier Index	7,817.9	0.24	0.24	0.68	1.42	4.56	1.60	16.30	3.48	35.66
Kuwait Main Index	6,631.5	-0.13	-0.13	0.35	5.65	19.06	1.17	11.97	4.49	8.17
Kuwait Sector										
Banking	1,790.0	0.28	0.28	0.86	2.10	8.65	1.77	17.29	3.06	26.74
Telecom	1,028.0	-0.16	-0.16	2.09	-0.01	-6.98	1.51	12.77	8.16	3.15
Industrials	703.6	0.38	0.38	-0.50	-3.03	-22.50	0.79	11.35	6.31	2.38
Financial Services	1,499.9	0.10	0.10	2.46	6.33	23.73	1.23	12.57	2.77	5.00
Real Estate	1,374.6	-0.12	-0.12	-1.08	-0.07	13.33	1.06	15.65	2.07	2.92
Basic Materials	901.6	-0.27	-0.27	-4.23	11.69	20.87	1.63	11.70	9.69	0.51
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,034.0	1.24	1.24	6.30	3.00	57.00	2.22	20.81	2.01	0.31
Insurance	1,967.9	-1.20	-1.20	-0.78	-5.56	-14.17	1.09	9.88	3.98	0.81
Consumer Discretionary	1,998.6	-0.02	-0.02	-5.03	10.65	24.61				
Energy	1,186.6	-0.12	-0.12	-0.98	6.18	25.03	1.01	9.31	5.33	0.24
Technology	1,004.0	-4.83	-4.83	-8.00	-30.65	73.59	1.22			0.01
Utilities	405.3	0.65	0.65	-6.10	4.05	-10.98				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices inched higher on Monday, along with other risk assets, after U.S. data showed cooling inflation, reviving hopes of further policy easing next year that will support global economic growth and oil demand. Brent crude futures rose 26 cents, or 0.4%, to \$73.20 a barrel.

Kuwait Market

The market closed up by 0.17% at 7,291.0 value traded 71.1 million KD, Premier market value reached 44.0 million KD up by 0.24% at 7,817.9

KSA Market

The market closed down by -0.36% at 11,849.4

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	0.875	0.57	0.57	0.57	-0.91	2.77	1.65	12.90	3.86	7.29
KFH	0.743	-0.13	-0.13	0.68	3.77	11.55	2.14	20.26	2.58	12.73
ZAIN	0.474	-0.21	-0.21	2.82	-0.21	-6.51	1.79	11.47	7.38	2.05
BOUBYAN BANK	0.558	1.27	1.27	2.01	-2.11	-1.42	2.26	27.00	1.35	2.35
AGILITY	0.251	0.40	0.40	-5.64	14.61	-11.38	0.66	10.48	7.97	0.67
Saudi Arabia										
ARAMCO	28.45	-1.90	-1.90	3.64	4.98	-13.79	4.62	16.79	6.77	6,888.75
SABIC	66.70	0.30	0.30	-3.19	-10.95	-20.12	1.21	80.99	5.10	200.21
STC	40.25	0.37	0.37	1.13	-7.89	2.30	2.53	15.80	3.98	201.36
AL-RAJHI BANK	90.30	0.44	0.44	-0.88	3.56	4.39	3.07	20.64	2.66	361.40
NCB	32.75	-0.76	-0.76	0.92	-4.52	-15.27	1.06	9.83	5.50	196.61
Abu Dhabi										
ETISALAT.AD	15.90	-1.24	-2.45	-3.99	-14.05	-19.04	3.20	12.49	5.13	138.28
FAB.AD	13.28	-0.15	1.53	3.75	-3.35	-4.87	1.14	9.09	5.35	146.71
EMIRATES NBD	20.40	-0.73	3.03	2.00	0.49	17.92	1.05	5.72	5.88	128.86
DB ISLAMIC DB	7.03	-0.71	3.69	3.38	11.59	22.90	1.10	7.28	6.40	50.90
EMAR.DU	12.90	2.38	34.52	35.08	47.94	62.88	1.42	9.57	3.88	114.02
Qatar										
QNB	17.350	0.58	0.58	1.46	2.36	4.96	1.44	10.54	3.78	160.23
INDUSTREIS QAT	13.010	0.85	0.85	0.23	-0.23	-0.54	2.13	14.74	5.38	78.70
QA ISLAMIC BK	21.200	1.63	1.63	1.34	-0.70	-1.40	1.65	11.66	2.89	50.09
MASRAF AL RAYA	2.474	-0.24	-0.24	2.87	0.16	-6.82	0.92	15.80	4.04	23.01
MESAEED PETRO	1.533	0.46	0.46	0.07	-5.95	-14.26	1.19	24.06	4.57	19.26
Oman										
BANK MUSCAT	0.253	0.40	0.40	0.40	0.40	-4.17	0.79	9.44	6.13	1.90
OMANTEL	0.920	-0.22	-0.22	1.10	-6.79	-13.21	1.09	10.88	6.52	0.69
BANK DHOFAR	0.158	0.00	0.00	-10.73	0.64	-1.25	0.64	17.71	4.91	0.47
NAT BANK OF OMAN	0.296	0.00	0.00	6.47	2.07	5.71	0.69	10.10	2.87	0.48
OMINVEST	0.330	0.30	0.30	-3.51	-6.25	-16.52	0.70	7.50	6.06	0.22

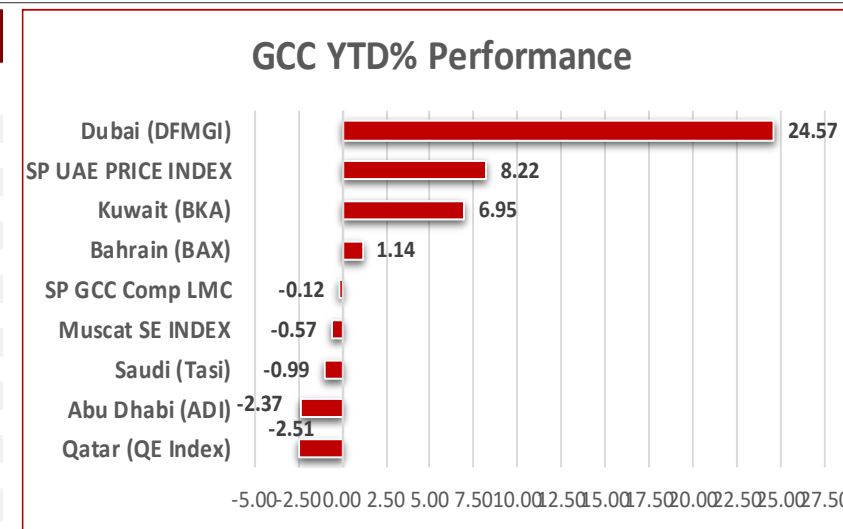
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
11-Dec. 24	24.62%	15.98%	0.06%	3.71%	8.51%	17.80%	13.22%	5.96%	6.12%
18-Dec. 24	24.67%	15.99%	0.06%	3.73%	8.59%	17.80%	13.21%	5.98%	6.13%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



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Kuwait

The market is down today by 0.17%, the leading sector index today is consumer staples up by 1.24%.

KSA

Saudi Armco had a negative performance today down by -1.90%. SABIC had a positive performance today up by 0.30%, STC had a positive performance today up by 0.37%, Al Rajhi Bank had positive performance up by 0.44%.

UAE

ETISALAT.AD has negative performance today by -1.24%, FAB.AD had a negative performance today down by -0.15%.



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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