

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

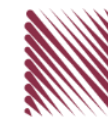
GCC DAILY MORNING BRIEF

Wednesday, 25th December 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

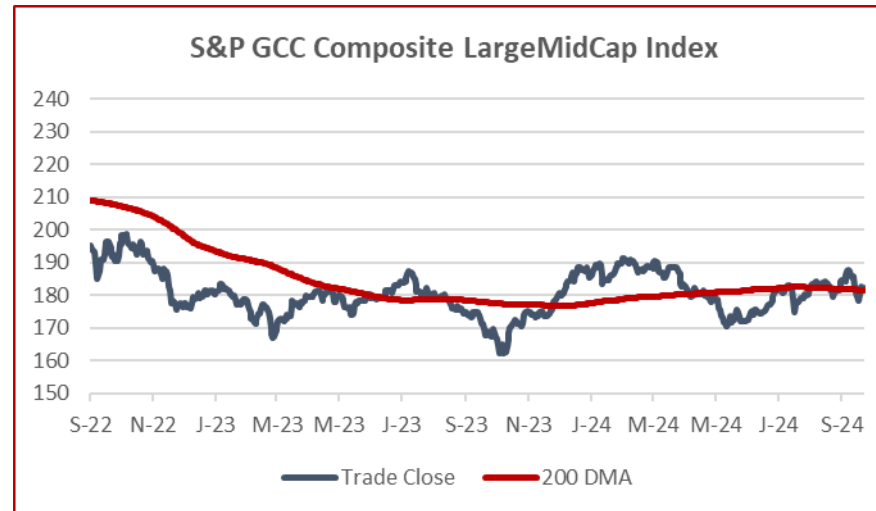


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,914.0	-0.29	0.18	2.34	-2.55	-0.45	2.37	20.02	3.42	10,207.21
Qatar (QE Index)	10,531.6	-0.05	0.70	1.09	-0.78	-2.76	1.23	11.69	4.25	532.96
Dubai (DFMGI)	5,080.4	0.48	0.46	4.81	12.81	25.14	1.83	10.22	4.60	770.08
Abu Dhabi (ADI)	9,435.2	0.35	0.90	2.17	0.10	-1.49	2.73	16.68	2.08	2,712.33
Bahrain (BAX)	1,987.6	-0.03	-0.65	-2.19	-1.25	0.82	0.92	9.55	4.53	7.57
Muscat SE INDEX	4,485.5	-0.16	-0.51	-1.70	-4.77	-0.63	0.82	9.47	6.04	7.16
SP GCC Comp LMC	186.3	0.04	0.83	2.83	0.37	0.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.5	0.33	0.92	5.14	6.03	9.21				

Developed Markets										
MSCI World Index	3,777.9	0.87	1.47	-0.85	1.47	19.21				
U.S. (S&P 500)	6,040.0	1.10	1.84	0.13	4.82	26.63	4.96	28.19	1.53	53,414.89
U.K. (FTSE 100)	8,137.0	0.42	0.65	-1.81	-1.21	5.22	1.68	15.55	3.76	2,107.43
Japan (topix)	2,727.3	0.02	0.94	1.74	3.07	15.25	1.43	14.39	2.28	957,252.83
Emerging Markets										
MSCI EM Index	1,085.0	0.28	1.19	0.60	-7.33	5.98				
China (SSE Composite)	3,393.5	1.26	0.76	2.02	1.71	14.07	1.36	12.00		44,025.04
India (Sensex)	78,472.9	-0.09	0.55	-1.67	-6.91	8.63	4.25	22.88	1.18	153,856.03

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,329.4	0.54	0.70	1.15	2.71	7.51	1.50	15.37	3.65	43.90
Kuwait Premier Index	7,844.3	0.25	0.57	1.02	1.76	4.91	1.61	16.35	3.47	35.77
Kuwait Main Index	6,721.9	1.80	1.24	1.72	7.09	20.69	1.16	11.86	4.53	8.12
Kuwait Sector										
Banking	1,795.0	0.29	0.56	1.14	2.39	8.95	1.78	17.34	3.06	26.81
Telecom	1,024.4	-0.30	-0.51	1.73	-0.36	-7.31	1.50	12.75	8.18	3.14
Industrials	714.8	1.32	1.98	1.08	-1.48	-21.27	0.79	11.40	6.27	2.39
Financial Services	1,496.8	0.18	-0.11	2.25	6.10	23.47	1.23	12.49	2.78	4.99
Real Estate	1,372.6	0.11	-0.27	-1.23	-0.22	13.16	1.05	15.51	2.08	2.91
Basic Materials	920.2	3.29	1.79	-2.25	13.99	23.37	1.60	11.53	9.83	0.50
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,061.7	-0.06	3.96	9.15	5.77	61.21	2.31	21.65	1.93	0.32
Insurance	2,255.6	14.37	13.25	13.73	8.25	-1.62	1.07	9.78	4.02	0.80
Consumer Discretionary	2,009.6	-0.61	0.53	-4.50	11.26	25.29				
Energy	1,190.1	0.44	0.18	-0.68	6.49	25.41	1.01	9.30	5.35	0.24
Technology	989.4	3.03	-6.21	-9.33	-31.66	71.07	1.11			0.01
Utilities	405.3	0.00	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 rose on Tuesday, reversing the prior session's losses, buoyed by a slightly positive market outlook for the short term, despite thin trade ahead of the Christmas holiday. Brent crude futures were up 82 cents, or 1.1%, at \$73.45 a barrel.

Kuwait Market

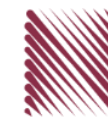
The market closed up by 0.54% at 7,329.4 value traded 53.5 million KD, Premier market value reached 32.9 million KD up by 0.25% at 7,844.3

KSA Market

The market closed down by -0.29% at 11,914.0

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	0.11	0.57	0.57	-0.91	2.77	1.65	12.90	3.86	7.29
KFH	0.746	0.40	0.27	1.08	4.19	12.00	2.15	20.34	2.57	12.77
ZAIN	0.471	-0.63	-0.84	2.17	-0.84	-7.10	1.78	11.39	7.43	2.04
BOUBYAN BANK	0.565	0.36	2.54	3.29	-0.88	-0.18	2.28	27.33	1.34	2.38
AGILITY	0.258	3.61	3.20	-3.01	17.81	-8.90	0.67	10.77	7.75	0.69
Saudi Arabia										
ARAMCO	28.25	-0.88	-2.59	2.91	4.24	-14.39	4.59	16.67	6.82	6,833.22
SABIC	67.10	0.00	0.90	-2.61	-10.41	-19.64	1.22	81.47	5.07	201.20
STC	40.55	0.50	1.12	1.88	-7.21	3.06	2.55	15.92	3.95	202.65
AL-RAJHI BANK	92.80	0.00	3.23	1.87	6.42	7.28	3.15	21.21	2.59	371.02
NCB	33.30	0.15	0.91	2.62	-2.92	-13.84	1.08	10.00	5.41	199.70
Abu Dhabi										
ETISALAT.AD	16.36	0.25	2.89	-1.21	-11.57	-16.70	3.29	12.85	4.98	142.28
FAB.AD	13.74	2.08	3.46	7.34	0.00	-1.58	1.18	9.40	5.17	151.79
EMIRATES NBD	21.35	0.95	4.66	6.75	5.17	23.41	1.09	5.99	5.62	134.86
DB ISLAMIC DB	7.03	-0.28	0.00	3.38	11.59	22.90	1.10	7.28	6.40	50.90
EMAR.DU	12.75	0.39	-1.16	33.51	46.22	60.98	1.40	9.46	3.92	112.69
Qatar										
QNB	17.290	0.35	0.23	1.11	2.01	4.60	1.43	10.51	3.79	159.65
INDUSTREIS QAT	13.000	0.00	0.78	0.15	-0.31	-0.61	2.13	14.72	5.38	78.63
QA ISLAMIC BK	21.150	0.24	1.39	1.10	-0.94	-1.63	1.65	11.63	2.90	49.96
MASRAF AL RAYA	2.498	0.73	0.73	3.87	1.13	-5.91	0.93	15.95	4.00	23.23
MESAIEED PETRO	1.521	-0.07	-0.33	-0.72	-6.69	-14.93	1.18	23.87	4.60	19.10
Oman										
BANK MUSCAT	0.252	-0.40	0.00	0.00	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.934	0.21	1.30	2.64	-5.37	-11.89	1.10	11.05	6.42	0.70
BANK DHOFAR	0.161	0.63	1.90	-9.04	2.55	0.63	0.66	18.05	4.81	0.48
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	0.319	-3.33	-3.04	-6.73	-9.37	-19.30	0.67	7.25	6.27	0.21

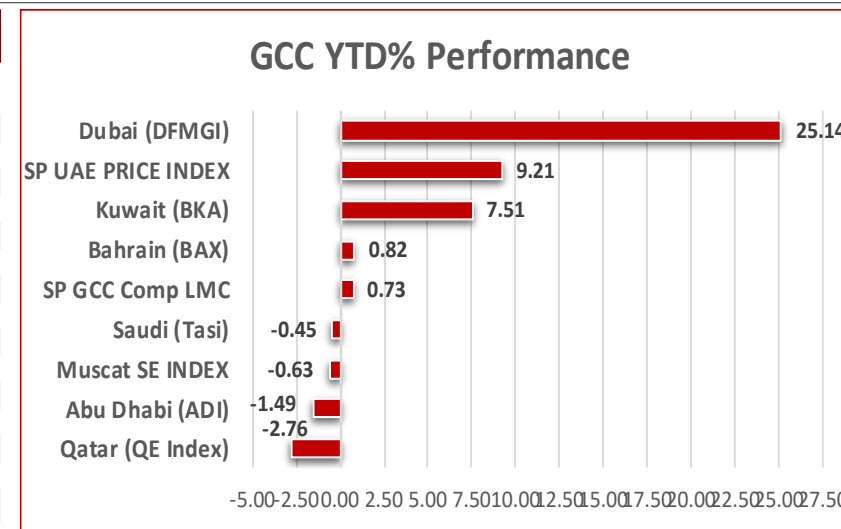
* GCC Markets performance at the latest close.

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



* GCC Markets performance at the latest close.

Kuwait

The market is up today by 0.54%, the leading sector index today is insurance up by 14.37%.

KSA

Saudi Armco had a negative performance today down by -0.88%. SABIC had a flat performance today, STC had a positive performance today up by 0.50%, Al Rajhi Bank had flat performance today.

UAE

ETISALAT.AD has positive performance today by 0.25%, FAB.AD had a positive performance today up by 2.08%.



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