



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 26th December 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

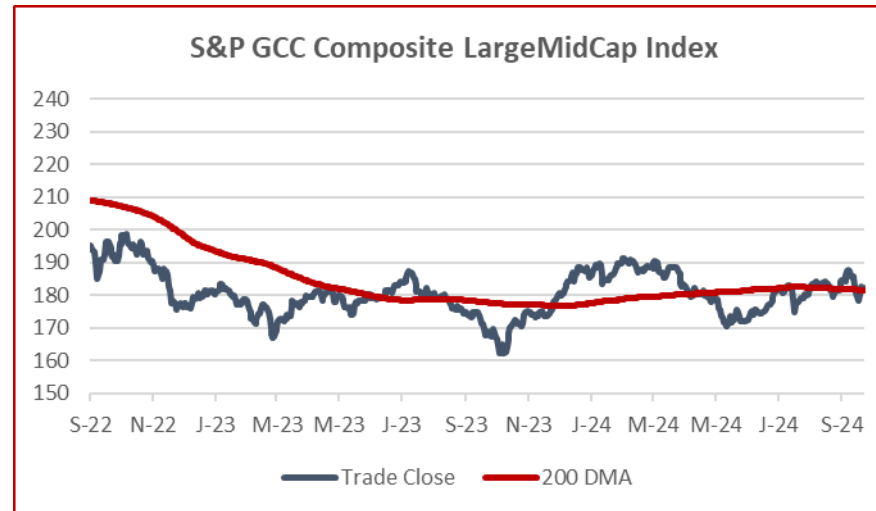


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,892.3	-0.18	0.00	2.16	-2.73	-0.63	2.37	19.99	3.41	10,169.82
Qatar (QE Index)	10,465.7	-0.63	0.07	0.46	-1.40	-3.37	1.22	11.62	4.28	529.69
Dubai (DFMGI)	5,083.7	0.07	0.52	4.88	12.88	25.22	1.83	10.23	4.59	771.55
Abu Dhabi (ADI)	9,415.0	-0.21	0.68	1.95	-0.11	-1.70	2.73	16.65	2.08	2,705.53
Bahrain (BAX)	1,985.3	-0.12	-0.77	-2.30	-1.37	0.70	0.92	9.54	4.53	7.56
Muscat SE INDEX	4,480.0	-0.12	-0.64	-1.82	-4.89	-0.76	0.82	9.46	6.05	7.15
SP GCC Comp LMC	186.2	-0.08	0.76	2.75	0.29	0.65	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.1	0.41	1.33	5.57	6.47	9.65				

Developed Markets										
MSCI World Index	3,778.5	0.02	1.49	-0.83	1.49	19.23				
U.S. (S&P 500)	6,040.0	0.00	1.84	0.13	4.82	26.63	5.01	28.51	1.51	54,019.62
U.K. (FTSE 100)	8,137.0	0.00	0.65	-1.81	-1.21	5.22	1.68	15.55	3.76	2,107.43
Japan (topix)	2,733.9	0.24	1.18	1.98	3.32	15.53	1.43	14.43	2.28	959,867.38
Emerging Markets										
MSCI EM Index	1,085.9	0.08	1.27	0.68	-7.26	6.07				
China (SSE Composite)	3,393.4	-0.01	0.75	2.01	1.70	14.06	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	153,857.31

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,345.7	0.22	0.92	1.38	2.93	7.75	1.51	15.45	3.63	44.13
Kuwait Premier Index	7,866.0	0.28	0.85	1.30	2.04	5.20	1.61	16.39	3.46	35.87
Kuwait Main Index	6,720.9	-0.02	1.22	1.70	7.08	20.67	1.18	12.08	4.45	8.26
Kuwait Sector										
Banking	1,802.7	0.43	0.99	1.57	2.82	9.42	1.78	17.39	3.05	26.89
Telecom	1,022.2	-0.22	-0.73	1.50	-0.58	-7.51	1.50	12.71	8.21	3.13
Industrials	715.1	0.04	2.02	1.13	-1.44	-21.23	0.80	11.55	6.19	2.42
Financial Services	1,501.8	0.34	0.23	2.60	6.46	23.89	1.23	12.51	2.78	5.00
Real Estate	1,370.5	-0.15	-0.42	-1.38	-0.37	12.99	1.05	15.52	2.08	2.91
Basic Materials	923.2	0.32	2.12	-1.94	14.36	23.76	1.66	11.91	9.52	0.52
Health Care	468.2	0.00	0.00	0.00	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,065.1	0.32	4.29	9.51	6.11	61.73	2.30	21.64	1.94	0.32
Insurance	2,182.9	-3.22	9.60	10.06	4.76	-4.80	1.23	11.18	3.52	0.91
Consumer Discretionary	2,020.8	0.56	1.09	-3.97	11.88	25.99				
Energy	1,171.4	-1.58	-1.40	-2.25	4.81	23.43	1.02	9.34	5.32	0.24
Technology	1,033.1	4.41	-2.07	-5.33	-28.64	78.62	1.15			0.01
Utilities	402.6	-0.65	0.00	-6.71	3.38	-11.56				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged higher on Thursday in thin holiday trading, driven by hopes for additional fiscal stimulus in China, the world's biggest oil importer, while an anticipated decline in U.S. crude inventories also provided support. Brent crude futures rose 11 cents, or 0.2%, to \$73.69 a barrel.

Kuwait Market

The market closed up by 0.22% at 7,345.7 value traded 45.6 million KD, Premier market value reached 22.7 million KD up by 0.28% at 7,866.0

KSA Market

The market closed down by -0.18% at 11,892.3

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	0.879	0.46	1.03	1.03	-0.45	3.24	1.65	12.96	3.85	7.31
KFH	0.750	0.54	0.81	1.63	4.75	12.60	2.16	20.45	2.56	12.82
ZAIN	0.470	-0.21	-1.05	1.95	-1.05	-7.30	1.77	11.37	7.45	2.03
BOUBYAN BANK	0.567	0.35	2.90	3.66	-0.53	0.17	2.29	27.43	1.33	2.38
AGILITY	0.257	-0.39	2.80	-3.38	17.35	-9.26	0.67	10.73	7.78	0.69
Saudi Arabia										
ARAMCO	28.10	-0.53	-3.10	2.37	3.69	-14.85	4.56	16.58	6.85	6,800.20
SABIC	67.20	0.15	1.05	-2.47	-10.28	-19.52	1.22	81.59	5.06	201.60
STC	40.35	-0.49	0.62	1.38	-7.67	2.55	2.54	15.84	3.97	201.75
AL-RAJHI BANK	92.20	-0.65	2.56	1.21	5.73	6.59	3.13	21.07	2.60	368.80
NCB	33.20	-0.30	0.61	2.31	-3.21	-14.10	1.08	9.97	5.42	199.20
Abu Dhabi										
ETISALAT.AD	16.52	0.98	3.90	-0.24	-10.70	-15.89	3.33	12.97	4.93	143.67
FAB.AD	13.90	1.16	4.67	8.59	1.16	-0.43	1.19	9.51	5.11	153.56
EMIRATES NBD	21.60	1.17	5.88	8.00	6.40	24.86	1.11	6.06	5.56	136.44
DB ISLAMIC DB	7.05	0.28	0.28	3.68	11.90	23.25	1.11	7.30	6.38	51.05
EMAR.DU	12.75	0.00	-1.16	33.51	46.22	60.98	1.40	9.46	3.92	112.69
Qatar										
QNB	17.160	-0.75	-0.52	0.35	1.24	3.81	1.42	10.43	3.82	158.50
INDUSTREIS QAT	13.010	0.08	0.85	0.23	-0.23	-0.54	2.13	14.74	5.38	78.71
QA ISLAMIC BK	21.020	-0.61	0.77	0.48	-1.55	-2.23	1.64	11.56	2.91	49.67
MASRAF AL RAYA	2.485	-0.52	0.20	3.33	0.61	-6.40	0.93	15.87	4.02	23.11
MESAEED PETRO	1.505	-1.05	-1.38	-1.76	-7.67	-15.83	1.16	23.62	4.65	18.91
Oman										
BANK MUSCAT	0.252	0.00	0.00	0.00	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.926	-0.86	0.43	1.76	-6.18	-12.64	1.09	10.96	6.48	0.69
BANK DHOFAR	0.161	0.00	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	0.00	-3.04	-6.73	-9.37	-19.30	0.67	7.25	6.27	0.21

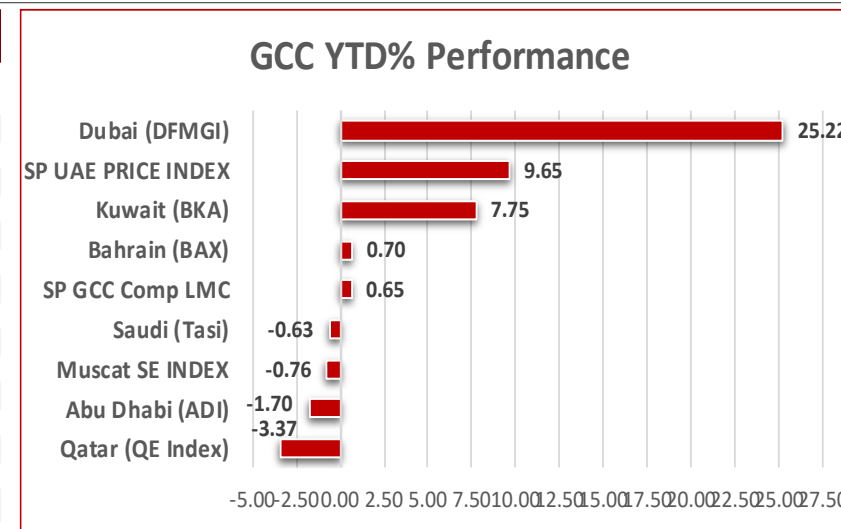
* GCC Markets performance at the latest close.

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 0.22%, the leading sector index today is technology up by 4.41%.

KSA

Saudi Armco had a negative performance today down by -0.53%. SABIC had a positive performance today up by 0.15%, STC had a negative performance today down by -0.49%, Al Rajhi Bank had a negative performance today down by -0.65%.

UAE

ETISALAT.AD has positive performance today by 0.98%, FAB.AD had a positive performance today up by 1.16%.



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