

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

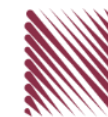
GCC DAILY MORNING BRIEF

Sunday, 29th December 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

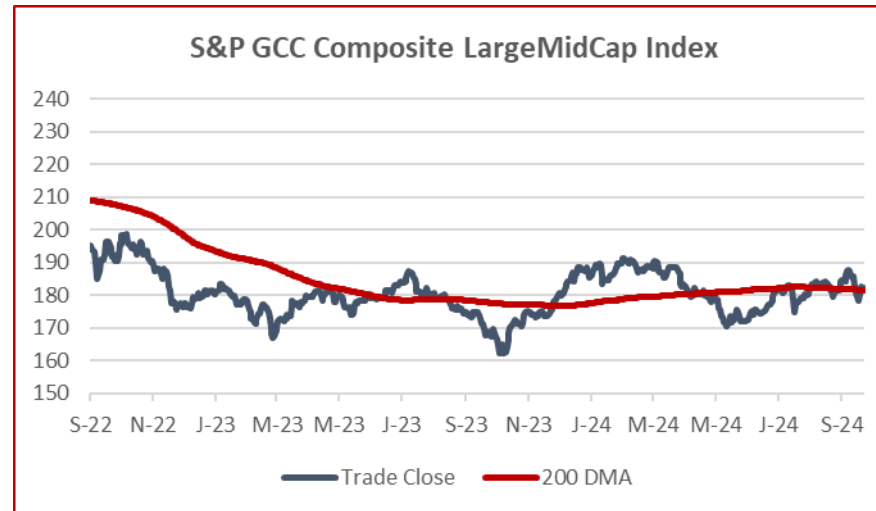


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,859.5	-0.28	-0.28	1.87	-3.00	-0.90	2.36	19.97	3.41	10,137.33
Qatar (QE Index)	10,413.4	-0.50	-0.43	-0.04	-1.89	-3.85	1.22	11.56	4.30	527.38
Dubai (DFMGI)	5,129.6	0.35	1.43	5.82	13.90	26.35	1.85	10.33	4.55	778.84
Abu Dhabi (ADI)	9,327.6	-0.52	-0.25	1.01	-1.04	-2.61	2.70	16.49	2.10	2,686.36
Bahrain (BAX)	1,986.1	0.04	-0.73	-2.26	-1.33	0.74	0.92	9.55	4.53	7.56
Muscat SE INDEX	4,468.2	-0.26	-0.90	-2.08	-5.14	-1.02	0.82	9.45	6.06	7.14
SP GCC Comp LMC	185.6	-0.07	0.47	2.46	0.01	0.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.0	-0.35	1.20	5.44	6.33	9.52				

Developed Markets										
MSCI World Index	3,755.4	-0.62	0.86	-1.44	0.87	18.50				
U.S. (S&P 500)	5,970.8	-1.11	0.67	-1.02	3.62	25.18	4.95	28.18	1.53	53,389.52
U.K. (FTSE 100)	8,149.8	0.16	0.81	-1.66	-1.06	5.39	1.69	15.58	3.75	2,110.28
Japan (topix)	2,801.7	1.26	3.69	4.51	5.89	18.39	1.46	14.79	2.22	983,559.59
Emerging Markets										
MSCI EM Index	1,082.9	-0.17	0.99	0.40	-7.51	5.78				
China (SSE Composite)	3,400.1	0.06	0.95	2.22	1.91	14.29	1.36	12.00		44,025.04
India (Sensex)	78,699.1	0.29	0.84	-1.38	-6.64	8.94	4.27	22.95	1.18	154,283.72

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,350.9	0.07	0.99	1.45	3.01	7.83	1.52	15.50	3.62	44.26
Kuwait Premier Index	7,870.3	0.05	0.91	1.36	2.10	5.26	1.62	16.45	3.45	35.99
Kuwait Main Index	6,730.4	0.14	1.36	1.84	7.23	20.84	1.19	12.09	4.44	8.28
Kuwait Sector										
Banking	1,801.5	-0.06	0.93	1.51	2.76	9.35	1.79	17.45	3.04	26.99
Telecom	1,024.1	0.19	-0.54	1.70	-0.39	-7.34	1.50	12.70	8.21	3.13
Industrials	722.5	1.03	3.08	2.17	-0.42	-20.42	0.81	11.68	6.12	2.45
Financial Services	1,514.0	0.81	1.04	3.43	7.33	24.89	1.24	12.65	2.74	5.05
Real Estate	1,372.2	0.12	-0.29	-1.26	-0.25	13.13	1.05	15.52	2.07	2.91
Basic Materials	928.5	0.58	2.71	-1.37	15.02	24.48	1.67	12.02	9.43	0.52
Health Care	455.3	-2.74	-2.74	-2.74	-3.26	-5.56	1.52	14.68	2.30	
Consumer Staples	1,050.8	-1.35	2.88	8.03	4.67	59.55	2.28	21.41	1.96	0.32
Insurance	2,107.5	-3.45	5.81	6.26	1.14	-8.08	1.15	10.45	3.76	0.85
Consumer Discretionary	2,032.1	0.56	1.66	-3.43	12.50	26.70				
Energy	1,178.6	0.62	-0.79	-1.64	5.46	24.19	1.01	9.23	5.39	0.24
Technology	1,047.6	1.41	-0.69	-4.00	-27.64	81.13	1.22			0.01
Utilities	407.9	1.31	1.31	-5.49	4.73	-10.41				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices settled more than 1% higher on Friday and recorded a weekly gain in low trading volume ahead of year-end, buoyed by a larger-than-expected drawdown from U.S. crude inventories last week. Brent crude futures rose 91 cents, or 1.2%, to settle at \$74.17 per barrel. U.S. West Texas Intermediate crude futures rose 98 cents, or 1.4%, to \$70.60 per barrel.

Kuwait Market

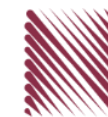
The market closed up by 0.07% at 7,350.9 value traded 37.0 million KD, Premier market value reached 23.3 million KD up by 0.05% at 7,870.3

KSA Market

The market closed down by -0.28% at 11,859.5

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	0.00	1.03	1.03	-0.45	3.24	1.65	12.96	3.85	7.32
KFH	0.749	-0.13	0.67	1.49	4.61	12.45	2.16	20.42	2.56	12.81
ZAIN	0.473	0.64	-0.42	2.60	-0.42	-6.71	1.78	11.44	7.40	2.05
BOUBYAN BANK	0.568	0.18	3.09	3.84	-0.35	0.35	2.30	27.48	1.33	2.39
AGILITY	0.256	-0.39	2.40	-3.76	16.89	-9.61	0.67	10.68	7.81	0.69
Saudi Arabia										
ARAMCO	28.00	-0.36	-3.45	2.00	3.32	-15.15	4.55	16.52	6.88	6,776.00
SABIC	67.20	0.00	1.05	-2.47	-10.28	-19.52	1.22	81.59	5.06	201.60
STC	40.15	-0.50	0.12	0.88	-8.12	2.04	2.53	15.76	3.99	200.75
AL-RAJHI BANK	91.90	-0.33	2.22	0.88	5.39	6.24	3.12	21.00	2.61	367.60
NCB	33.15	-0.15	0.45	2.16	-3.35	-14.23	1.08	9.95	5.43	198.90
Abu Dhabi										
ETISALAT.AD	16.66	-1.32	3.40	-0.72	-11.14	-16.29	3.31	12.91	4.96	142.97
FAB.AD	13.80	-1.45	2.41	6.25	-1.02	-2.58	1.16	9.31	5.22	150.25
EMIRATES NBD	21.40	-0.70	4.90	7.00	5.42	23.70	1.10	6.00	5.61	135.18
DB ISLAMIC DB	7.06	0.43	0.43	3.82	12.06	23.43	1.11	7.31	6.37	51.12
EMAR.DU	12.80	0.00	-0.78	34.03	46.79	61.62	1.41	9.49	3.91	113.14
Qatar										
QNB	17.090	-0.41	-0.93	-0.06	0.83	3.39	1.41	10.39	3.83	157.85
INDUSTREIS QAT	13.000	-0.08	0.78	0.15	-0.31	-0.61	2.13	14.72	5.38	78.65
QA ISLAMIC BK	20.760	-1.24	-0.48	-0.76	-2.76	-3.44	1.62	11.42	2.95	49.05
MASRAF AL RAYA	2.481	-0.16	0.04	3.16	0.45	-6.55	0.92	15.84	4.03	23.07
MESAEED PETRO	1.494	-0.73	-2.10	-2.48	-8.34	-16.44	1.16	23.45	4.69	18.77
Oman										
BANK MUSCAT	0.251	-0.40	-0.40	-0.40	-0.40	-4.92	0.78	9.36	6.18	1.88
OMANTEL	0.927	0.11	0.54	1.87	-6.08	-12.55	1.10	10.97	6.47	0.70
BANK DHOFAR	0.150	-6.83	-5.06	-15.25	-4.46	-6.25	0.61	16.82	5.17	0.45
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	0.320	0.31	-2.74	-6.43	-9.09	-19.05	0.68	7.27	6.25	0.21

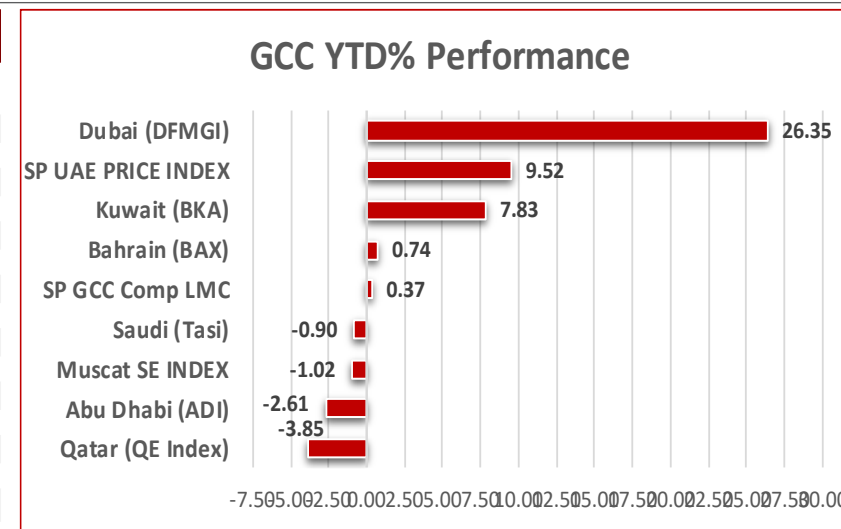
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Dec. 24	24.67%	15.99%	0.06%	3.73%	8.59%	17.80%	13.21%	5.98%	6.13%
25-Dec. 24	24.68%	15.88%	0.06%	3.74%	8.57%	17.80%	13.28%	5.93%	6.09%

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 0.07%, the leading sector index today is technology up by 1.41%.

KSA

Saudi Armco had a negative performance today down by -0.36%. SABIC had a flat performance today, STC had a negative performance today down by -0.50%, Al Rajhi Bank had a negative performance today down by -0.33%.

UAE

ETISALAT.AD has negative performance today by -1.32%, FAB.AD had a negative performance today down by -1.45%.



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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