

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

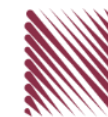
GCC DAILY MORNING BRIEF

Monday, 30th December 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

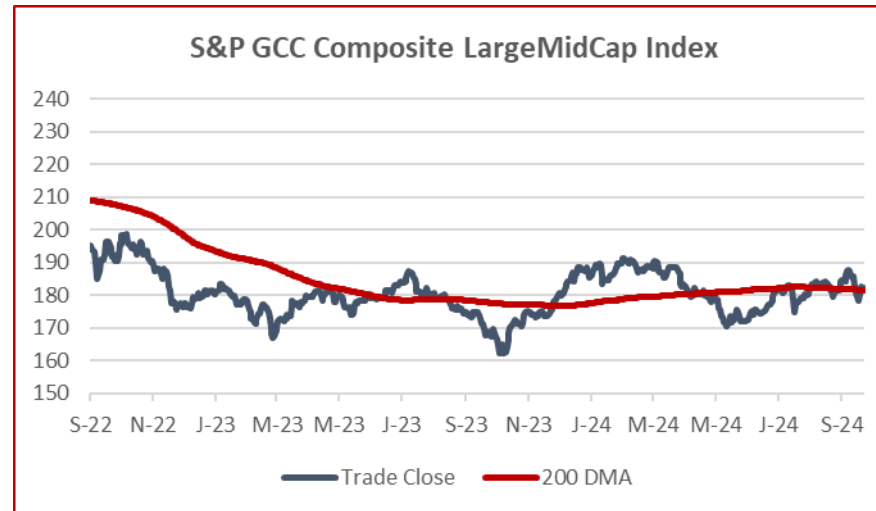


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,892.8	0.28	0.28	2.16	-2.73	-0.62	2.37	20.05	3.40	10,114.67
Qatar (QE Index)	10,511.5	0.94	0.94	0.90	-0.97	-2.95	1.23	11.67	4.26	532.17
Dubai (DFMGI)	5,129.6	0.35	1.43	5.82	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)	1,985.5	-0.03	-0.03	-2.29	-1.36	0.71	0.92	9.54	4.53	7.56
Muscat SE INDEX	4,516.0	1.07	1.07	-1.03	-4.13	0.04	0.82	9.53	6.01	7.21
SP GCC Comp LMC	186.1	0.27	0.27	2.74	0.28	0.64	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.0	0.00	0.00	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	7,365.3	0.20	0.20	1.65	3.21	8.04	1.52	15.50	3.62	44.26
Kuwait Premier Index	7,860.8	-0.12	-0.12	1.24	1.97	5.13	1.62	16.45	3.45	35.99
Kuwait Main Index	6,837.8	1.60	1.60	3.47	8.94	22.77	1.19	12.09	4.44	8.28
Kuwait Sector										
Banking	1,806.6	0.28	0.28	1.79	3.05	9.66	1.79	17.45	3.04	26.99
Telecom	1,023.8	-0.02	-0.02	1.67	-0.42	-7.36	1.50	12.70	8.21	3.13
Industrials	718.1	-0.61	-0.61	1.55	-1.03	-20.90	0.81	11.68	6.12	2.45
Financial Services	1,515.1	0.07	0.07	3.50	7.41	24.99	1.24	12.65	2.74	5.05
Real Estate	1,370.4	-0.13	-0.13	-1.39	-0.38	12.99	1.05	15.52	2.07	2.91
Basic Materials	939.8	1.21	1.21	-0.18	16.41	25.99	1.67	12.02	9.43	0.52
Health Care	455.3	0.00	0.00	-2.74	-3.26	-5.56	1.52	14.68	2.30	
Consumer Staples	1,020.3	-2.90	-2.90	4.89	1.64	54.92	2.28	21.41	1.96	0.32
Insurance	2,152.8	2.15	2.15	8.55	3.31	-6.11	1.15	10.45	3.76	0.85
Consumer Discretionary	2,055.1	1.13	1.13	-2.34	13.78	28.13				
Energy	1,173.8	-0.41	-0.41	-2.04	5.03	23.68	1.01	9.23	5.39	0.24
Technology	1,047.6	0.00	0.00	-4.00	-27.64	81.13	1.22			0.01
Utilities	400.0	-1.93	-1.93	-7.32	2.70	-12.14				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slipped lower on Monday in thin holiday trade ahead of the year-end as traders awaited more economic data from China and the U.S. later this week to assess growth in the world's two largest oil consumers. Brent crude futures fell 6 cents to \$74.11 a barrel by 0111 GMT while the more active March contract was at \$73.73 a barrel, down 6 cents.

Kuwait Market

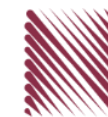
The market closed up by 0.20% at 7,365.3 value traded 35.2 million KD, Premier market value reached 16.1 million KD down by -0.12% at 7,860.8

KSA Market

The market closed up by 0.28% at 11,892.8

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	0.881	0.23	0.23	1.26	-0.23	3.47	1.66	12.99	3.84	7.34
KFH	0.749	0.00	0.00	1.49	4.61	12.45	2.16	20.42	2.56	12.82
ZAIN	0.472	-0.21	-0.21	2.39	-0.63	-6.90	1.78	11.42	7.42	2.04
BOUBYAN BANK	0.568	0.00	0.00	3.84	-0.35	0.35	2.30	27.48	1.33	2.39
AGILITY	0.253	-1.17	-1.17	-4.89	15.53	-10.67	0.66	10.56	7.91	0.68
Saudi Arabia										
ARAMCO	27.85	-0.54	-0.54	1.46	2.77	-15.61	4.52	16.43	6.92	6,744.19
SABIC	67.20	0.00	0.00	-2.47	-10.28	-19.52	1.22	81.59	5.06	201.73
STC	39.90	-0.62	-0.62	0.25	-8.70	1.41	2.51	15.66	4.01	199.63
AL-RAJHI BANK	92.00	0.11	0.11	0.99	5.50	6.36	3.12	21.03	2.61	368.25
NCB	33.65	1.51	1.51	3.70	-1.90	-12.94	1.09	10.10	5.35	202.03
Abu Dhabi										
ETISALAT.AD	16.44	-1.32	3.40	-0.72	-11.14	-16.29	3.31	12.91	4.96	142.97
FAB.AD	13.60	-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	17.250	0.94	0.94	0.88	1.77	4.36	1.43	10.48	3.80	159.33
INDUSTREIS QAT	13.140	1.08	1.08	1.23	0.77	0.46	2.16	14.88	5.33	79.50
QA ISLAMIC BK	21.030	1.30	1.30	0.53	-1.50	-2.19	1.64	11.57	2.91	49.69
MASRAF AL RAYA	2.490	0.36	0.36	3.53	0.81	-6.21	0.93	15.90	4.02	23.16
MESAEED PETRO	1.498	0.27	0.27	-2.22	-8.10	-16.22	1.16	23.51	4.67	18.82
Oman										
BANK MUSCAT	0.252	0.40	0.40	0.00	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.925	-0.22	-0.22	1.65	-6.28	-12.74	1.09	10.94	6.49	0.69
BANK DHOFAR	0.150	0.00	0.00	-15.25	-4.46	-6.25	0.61	16.82	4.84	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	0.00	0.00	-6.43	-9.09	-19.05	0.68	7.27	6.27	0.21

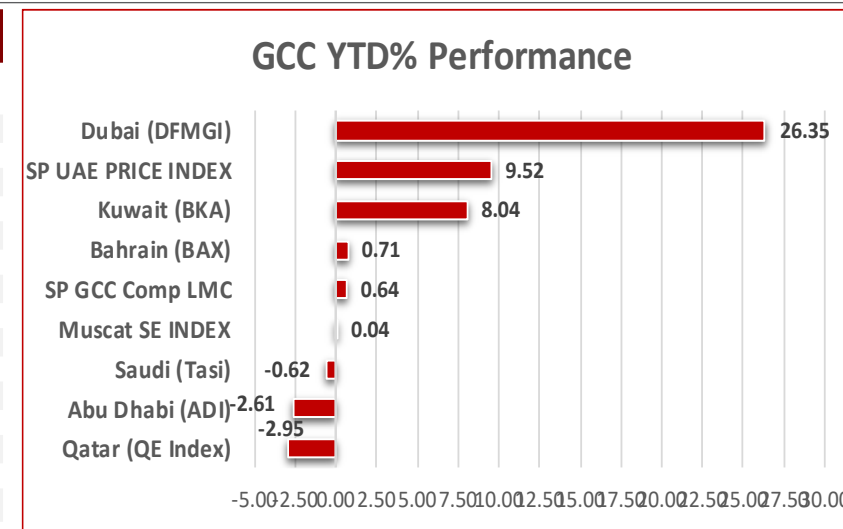
* GCC Markets performance at the latest close.

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 0.20%, the leading sector index today is insurance up by 2.15%.

KSA

Saudi Armco had a negative performance today down by -0.54%. SABIC had a flat performance today, STC had a negative performance today down by -0.62%, Al Rajhi Bank had a positive performance today up by 0.11%.

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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