



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday, 09<sup>th</sup> December 2024



# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP

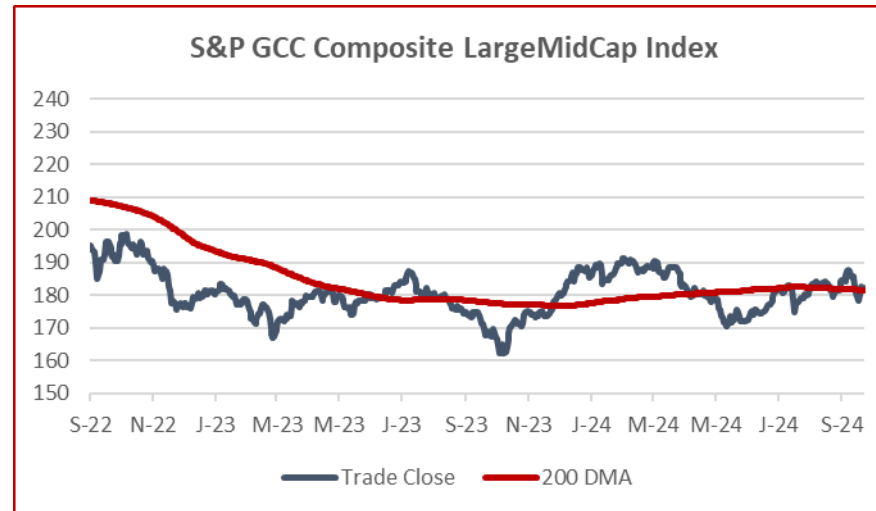


| * Market Watch     | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)       | 11,955.2    | 0.20  | 0.20  | 2.70  | -2.22 | -0.10 | 3.01 | 23.03 | 3.04           | 10,184.67             |
| Qatar (QE Index)   | 10,361.5    | -0.29 | -0.29 | -0.54 | -2.38 | -4.33 | 1.21 | 11.49 | 4.33           | 524.19                |
| Dubai (DFMGI)      | 4,854.5     | 0.71  | 0.15  | 0.15  | 7.79  | 19.57 | 1.71 | 9.52  | 4.94           | 729.57                |
| Abu Dhabi (ADI)    | 9,266.3     | -0.11 | 0.34  | 0.34  | -1.69 | -3.25 | 2.70 | 16.55 | 2.11           | 2,662.19              |
| Bahrain (BAX)      | 2,035.5     | 0.00  | 0.00  | 0.17  | 1.13  | 3.25  | 0.95 | 9.85  | 4.41           | 7.75                  |
| Muscat SE INDEX    | 4,548.2     | -0.51 | -0.51 | -0.33 | -3.44 | 0.76  | 0.83 | 9.58  | 5.98           | 7.24                  |
| SP GCC Comp LMC    | 183.9       | -0.03 | -0.03 | 1.48  | -0.94 | -0.59 | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX | 143.9       | 0.00  | 0.00  | 0.50  | 1.36  | 4.39  |      |       |                |                       |

|                          |          |       |      |      |       |       |      |       |      |            |
|--------------------------|----------|-------|------|------|-------|-------|------|-------|------|------------|
| <b>Developed Markets</b> |          |       |      |      |       |       |      |       |      |            |
| MSCI World Index         | 3,855.1  | 0.17  | 1.18 | 1.18 | 3.55  | 21.64 |      |       |      |            |
| U.S. (S&P 500)           | 6,090.3  | 0.25  | 0.96 | 0.96 | 5.69  | 27.68 | 5.04 | 28.65 | 1.50 | 54,280.34  |
| U.K. (FTSE 100)          | 8,308.6  | -0.49 | 0.26 | 0.26 | 0.87  | 7.44  | 1.71 | 15.78 | 3.68 | 2,149.41   |
| Japan (topix)            | 2,727.2  | -0.55 | 1.73 | 1.73 | 3.07  | 15.25 | 1.43 | 14.39 | 2.28 | 955,999.89 |
| <b>Emerging Markets</b>  |          |       |      |      |       |       |      |       |      |            |
| MSCI EM Index            | 1,105.1  | 0.25  | 2.46 | 2.46 | -5.62 | 7.94  |      |       |      |            |
| China (SSE Composite)    | 3,404.1  | 1.05  | 2.33 | 2.33 | 2.03  | 14.43 | 1.36 | 12.00 |      | 44,025.04  |
| India (Sensex)           | 81,709.1 | -0.07 | 2.39 | 2.39 | -3.07 | 13.11 | 4.35 | 23.49 | 1.13 | 160,257.89 |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD    | YTD    | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| Kuwait All Share Index | 7,275.7     | -0.19 | -0.19 | 0.41  | 1.95   | 6.72   | 1.50 | 15.38 | 3.65           | 43.90                 |
| Kuwait Premier Index   | 7,792.1     | -0.21 | -0.21 | 0.35  | 1.08   | 4.21   | 1.60 | 16.32 | 3.47           | 35.70                 |
| Kuwait Main Index      | 6,652.8     | -0.09 | -0.09 | 0.67  | 5.99   | 19.45  | 1.17 | 11.99 | 4.49           | 8.19                  |
| <b>Kuwait Sector</b>   |             |       |       |       |        |        |      |       |                |                       |
| Banking                | 1,781.0     | -0.12 | -0.12 | 0.35  | 1.59   | 8.11   | 1.77 | 17.28 | 3.07           | 26.71                 |
| Telecom                | 1,013.3     | -0.32 | -0.32 | 0.62  | -1.44  | -8.31  | 1.49 | 12.61 | 8.27           | 3.11                  |
| Industrials            | 711.2       | -0.41 | -0.41 | 0.57  | -1.98  | -21.67 | 0.80 | 11.57 | 6.19           | 2.42                  |
| Financial Services     | 1,483.7     | 0.43  | 0.43  | 1.36  | 5.18   | 22.40  | 1.21 | 12.38 | 2.80           | 4.94                  |
| Real Estate            | 1,397.2     | -0.39 | -0.39 | 0.54  | 1.57   | 15.19  | 1.08 | 15.92 | 2.04           | 2.98                  |
| Basic Materials        | 943.6       | -4.95 | -4.95 | 0.23  | 16.89  | 26.50  | 1.79 | 12.85 | 8.82           | 0.56                  |
| Health Care            | 468.2       | 0.00  | 0.00  | 0.00  | -0.54  | -2.90  | 1.57 | 15.09 | 2.24           |                       |
| Consumer Staples       | 1,010.3     | -0.20 | -0.20 | 3.87  | 0.65   | 53.41  | 2.20 | 20.63 | 2.03           | 0.31                  |
| Insurance              | 1,975.2     | -0.20 | -0.20 | -0.41 | -5.21  | -13.85 | 1.08 | 9.81  | 4.01           | 0.80                  |
| Consumer Discretionary | 2,061.8     | -0.16 | -0.16 | -2.02 | 14.15  | 28.55  |      |       |                |                       |
| Energy                 | 1,172.5     | -1.32 | -1.32 | -2.15 | 4.91   | 23.55  | 1.01 | 9.32  | 5.33           | 0.24                  |
| Technology             | 1,047.6     | -2.04 | -2.04 | -4.00 | -27.64 | 81.13  | 1.24 |       |                | 0.01                  |
| Utilities              | 421.1       | -1.84 | -1.84 | -2.44 | 8.11   | -7.51  |      |       |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

Oil prices were mixed in early Asia trade on Monday as concerns over weak Chinese demand were offset by rising tensions in the Middle East following the rebel overthrow of Syrian President Bashar al-Assad. Brent crude futures fell by 1 cent to \$71.11 per barrel.

#### Kuwait Market

The market closed down by - 0.19% at 7,275.7 value traded 52.3 million KD, Premier market value reached 26.9 million KD down by -0.21% at 7,792.1

#### KSA Market

The market closed up by 0.20% at 11,955.2.

# 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) |
|------------------------|-------------|-------|-------|-------|--------|--------|------|-------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |        |        |      |       |                |                       |
| <b>Kuwait</b>          |             |       |       |       |        |        |      |       |                |                       |
| NBK                    | 0.879       | -0.34 | -0.34 | 1.03  | -0.45  | 3.24   | 1.65 | 12.96 | 3.85           | 7.32                  |
| KFH                    | 0.737       | -0.14 | -0.14 | -0.14 | 2.93   | 10.65  | 2.12 | 20.09 | 2.60           | 12.61                 |
| ZAIN                   | 0.466       | 0.00  | 0.00  | 1.08  | -1.89  | -8.09  | 1.76 | 11.27 | 7.51           | 2.02                  |
| BOUBYAN BANK           | 0.546       | 0.00  | 0.00  | -0.18 | -4.21  | -3.54  | 2.21 | 26.42 | 1.38           | 2.29                  |
| AGILITY                | 0.265       | -0.75 | -0.75 | -0.38 | 21.00  | -6.43  | 0.69 | 11.06 | 7.55           | 0.71                  |
| <b>Saudi Arabia</b>    |             |       |       |       |        |        |      |       |                |                       |
| ARAMCO                 | 27.95       | 0.00  | 0.00  | 1.82  | 3.14   | -15.30 | 4.54 | 16.49 | 6.89           | 6,762.46              |
| SABIC                  | 68.80       | 0.44  | 0.44  | -0.15 | -8.14  | -17.60 | 1.25 | 83.54 | 4.80           | 206.36                |
| STC                    | 40.25       | 0.88  | 0.88  | 1.13  | -7.89  | 2.30   | 2.53 | 15.80 | 3.98           | 201.21                |
| AL-RAJHI BANK          | 90.50       | -0.88 | -0.88 | -0.66 | 3.78   | 4.62   | 3.07 | 20.68 | 2.65           | 361.92                |
| NCB                    | 34.15       | 1.49  | 1.49  | 5.24  | -0.44  | -11.64 | 1.11 | 10.25 | 5.27           | 204.86                |
| <b>Abu Dhabi</b>       |             |       |       |       |        |        |      |       |                |                       |
| ETISALAT.AD            | 16.62       | -0.24 | 0.36  | 0.36  | -10.16 | -15.38 | 3.35 | 13.05 | 4.90           | 144.54                |
| FAB.AD                 | 13.20       | 0.61  | 3.12  | 3.12  | -3.93  | -5.44  | 1.13 | 9.03  | 5.38           | 145.83                |
| EMIRATES NBD           | 19.65       | 1.03  | -1.75 | -1.75 | -3.20  | 13.58  | 1.01 | 5.51  | 6.11           | 124.12                |
| DB ISLAMIC DB          | 6.77        | -1.74 | -0.44 | -0.44 | 7.46   | 18.36  | 1.06 | 7.01  | 6.65           | 49.02                 |
| EMAR.DU                | 9.70        | 1.04  | 1.57  | 1.57  | 11.24  | 22.47  | 1.06 | 7.20  | 5.15           | 85.74                 |
| <b>Qatar</b>           |             |       |       |       |        |        |      |       |                |                       |
| QNB                    | 16.880      | -1.86 | -1.86 | -1.29 | -0.41  | 2.12   | 1.40 | 10.26 | 3.88           | 155.91                |
| INDUSTREIS QAT         | 12.820      | 0.16  | 0.16  | -1.23 | -1.69  | -1.99  | 2.10 | 14.52 | 5.46           | 77.56                 |
| QA ISLAMIC BK          | 20.900      | -0.14 | -0.14 | -0.10 | -2.11  | -2.79  | 1.63 | 11.49 | 2.93           | 49.39                 |
| MASRAF AL RAYA         | 2.398       | -0.50 | -0.50 | -0.29 | -2.91  | -9.68  | 0.89 | 15.31 | 4.17           | 22.30                 |
| MESAEED PETRO          | 1.505       | -0.33 | -0.33 | -1.76 | -7.67  | -15.83 | 1.16 | 23.62 | 4.65           | 18.91                 |
| <b>Oman</b>            |             |       |       |       |        |        |      |       |                |                       |
| BANK MUSCAT            | 0.254       | -0.39 | -0.39 | 0.79  | 0.79   | -3.79  | 0.79 | 9.47  | 6.10           | 1.91                  |
| OMANTEL                | 0.933       | -0.21 | -0.21 | 2.53  | -5.47  | -11.98 | 1.10 | 11.04 | 6.43           | 0.70                  |
| BANK DHOFAR            | 0.170       | 0.00  | 0.00  | -3.95 | 8.28   | 6.25   | 0.69 | 19.06 | 4.56           | 0.51                  |
| NAT BANK OF OMAN       | 0.288       | 0.00  | 0.00  | 3.60  | -0.69  | 2.86   | 0.67 | 9.82  | 2.95           | 0.47                  |
| OMINVEST               | 0.336       | -1.75 | -1.75 | -1.75 | -4.55  | -15.00 | 0.71 | 7.63  | 5.95           | 0.22                  |

\* GCC Markets performance at the latest close.

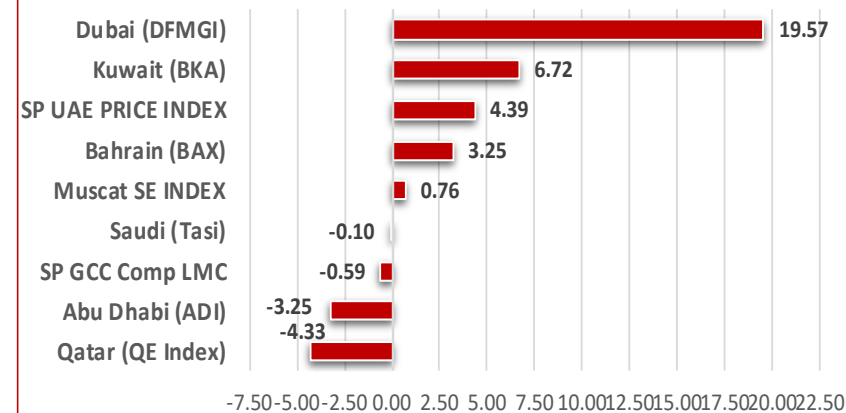
| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 27-Nov. 24      | 24.68% | 16.13% | 0.06% | 3.71% | 8.31% | 17.77% | 13.20% | 5.96%   | 6.02% |
| 04-Dec. 24      | 24.58% | 15.92% | 0.06% | 3.70% | 8.34% | 17.75% | 13.20% | 5.93%   | 6.11% |

### End of Report

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Sources, Bursa Kuwait , LSEG , NIC

## GCC YTD% Performance



\* GCC Markets performance at the latest close.

### Kuwait

The market is up today by +0.19 %, the leading sector best performance indices today is financial services up by 0.43%.

### KSA

Saudi Armco has flat performance today. SABIC has a positive performance today up by 0.44%, STC has positive performance today up by 0.88%, Al Rajhi Bank has negative performance by 0.88%.

### UAE

ETISALAT.AD has negative performance today by 0.24%, FAB.AD has positive performance today by 0.61%



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