

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

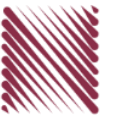
GCC DAILY MORNING BRIEF

Monday, 02nd December 2024



DAILY MARKETS WRAP,

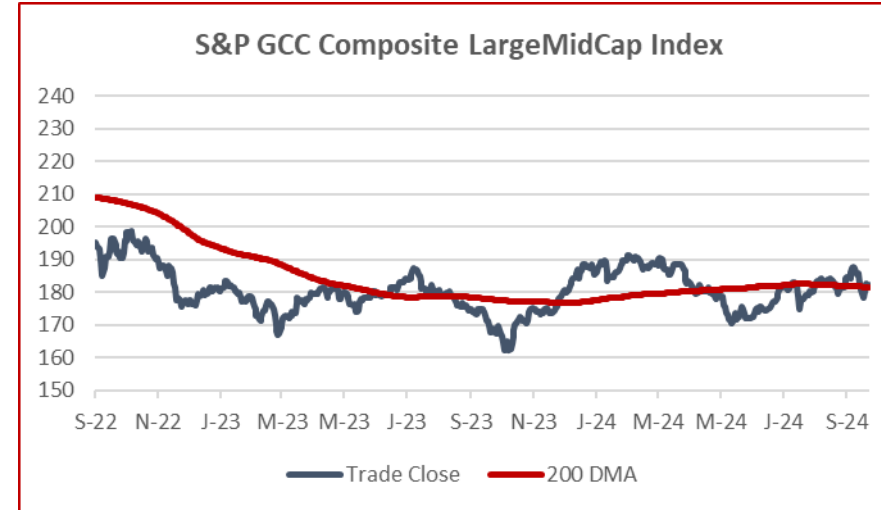
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,741.7	0.86	0.86	0.86	-3.96	-1.89	2.92	22.55	3.13	10,014.38
Qatar (QE Index)	10,392.7	-0.24	-0.24	-0.24	-2.09	-4.04	1.22	11.54	4.31	527.11
Dubai (DFMGI)	4,847.3	0.50	2.62	5.58	7.64	19.40	1.72	9.63	4.89	726.34
Abu Dhabi (ADI)	9,234.8	-0.28	0.03	-1.00	-2.02	-3.58	2.69	16.50	2.12	2,652.60
Bahrain (BAX)	2,031.1	-0.04	-0.04	-0.04	0.91	3.02	0.95	9.82	4.42	7.74
Muscat SE INDEX	4,578.4	0.34	0.34	0.34	-2.80	1.42	0.83	9.62	5.96	7.27
SP GCC Comp LMC	182.1	0.53	0.53	0.53	-1.87	-1.52	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.2	0.00	0.00	0.00	0.85	3.87				
Developed Markets										
MSCI World Index	3,810.1	0.55	1.17	4.47	2.34	20.22				
U.S. (S&P 500)	6,032.4	0.56	1.06	5.73	4.68	26.47	5.00	28.44	1.50	53,710.14
U.K. (FTSE 100)	8,287.3	0.07	0.31	2.18	0.61	7.16	1.71	15.70	3.67	2,143.93
Japan (topix)	2,680.7	-0.24	-0.59	-0.55	1.31	13.28	1.40	14.15	2.32	940,974.12
Emerging Markets										
MSCI EM Index	1,078.6	-0.10	-0.80	-3.66	-7.88	5.36				
China (SSE Composite)	3,326.5	0.93	1.81	1.42	-0.30	11.82	1.36	12.00		44,025.04
India (Sensex)	79,802.8	0.96	0.87	0.52	-5.33	10.47	4.25	22.94	1.16	156,535.42

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,246.0	0.18	-1.00	1.23	1.54	6.29	1.49	15.29	3.67	43.64
Kuwait Premier Index	7,764.8	0.17	-0.91	1.22	0.73	3.85	1.60	16.24	3.49	35.51
Kuwait Main Index	6,608.5	0.22	-1.42	1.30	5.29	18.65	1.17	11.88	4.56	8.13
Kuwait Sector										
Banking	1,774.8	0.31	-1.06	1.63	1.23	7.73	1.76	17.20	3.08	26.59
Telecom	1,007.0	-0.16	-0.80	-0.64	-2.05	-8.88	1.47	12.49	8.35	3.08
Industrials	707.2	0.29	-0.40	1.25	-2.54	-22.11	0.80	11.45	6.25	2.40
Financial Services	1,463.8	0.45	0.04	0.99	3.77	20.76	1.20	12.23	2.82	4.89
Real Estate	1,389.7	-0.08	0.25	-1.38	1.02	14.57	1.07	15.82	2.06	2.95
Basic Materials	941.4	-1.84	-11.00	10.76	16.62	26.21	1.69	12.18	9.30	0.53
Health Care	468.2	0.00	0.00	-0.54	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	972.7	-2.74	-2.44	-10.55	-3.10	47.69	2.11	19.82	2.11	0.30
Insurance	1,983.3	0.04	-0.15	-4.00	-4.82	-13.50	1.08	9.83	4.00	0.80
Consumer Discretionary	2,104.4	-0.41	-3.67	6.43	16.50	31.20				
Energy	1,198.3	0.09	1.00	4.22	7.22	26.26	1.02	9.40	5.29	0.24
Technology	1,091.3	0.00	-3.85	0.67	-24.62	88.68	1.27			0.02
Utilities	431.6	0.00	-1.20	5.81	10.81	-5.20				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged up on Monday supported by upbeat factory activity in the world's second largest oil consumer China and as Israel resumed attacks on Lebanon despite a ceasefire agreement, stoking tensions in the Middle East. Brent crude futures climbed 8 cents, or 0.1%, to \$71.92 a barrel by 0107 GMT while U.S. West Texas Intermediate crude was at \$68.09 a barrel, up 9 cents, or 0.1%.

Kuwait Market

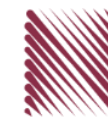
The market closed up by + 0.18% at 7,246 value traded 68.2 million KD, Premier market value reached 43.6 million KD up by 0.17% at 7,764.8

KSA Market

The market closed up by +0.86% at 11,741.7.

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	0.870	0.12	-0.91	2.35	-1.47	2.18	1.64	12.83	3.89	7.24
KFH	0.738	0.41	-0.81	2.36	3.07	10.80	2.12	20.12	2.60	12.63
ZAIN	0.461	0.22	-0.43	1.10	-2.95	-9.07	1.74	11.15	7.59	1.99
BOUBYAN BANK	0.547	0.18	-3.87	-1.97	-4.04	-3.36	2.21	26.46	1.38	2.30
AGILITY	0.266	0.38	-2.56	6.83	21.46	-6.08	0.69	11.10	7.52	0.71
Saudi Arabia										
ARAMCO	27.55	0.36	0.36	0.36	1.66	-16.52	4.48	16.26	6.99	6,666.57
SABIC	68.70	-0.29	-0.29	-0.29	-8.28	-17.72	1.25	83.42	4.80	206.08
STC	39.80	0.00	0.00	0.00	-8.92	1.15	2.50	15.63	4.02	198.98
AL-RAJHI BANK	92.80	1.87	1.87	1.87	6.42	7.28	3.15	21.21	2.59	371.17
NCB	32.50	0.15	0.15	0.15	-5.25	-15.91	1.06	9.76	5.54	194.98
Abu Dhabi										
ETISALAT.AD	16.56	-1.78	-2.59	-6.55	-10.49	-15.68	3.33	13.01	4.92	144.02
FAB.AD	12.80	-1.54	-0.78	-2.59	-6.84	-8.31	1.10	8.76	5.55	141.41
EMIRATES NBD	20.00	1.78	2.56	5.26	-1.48	15.61	1.03	5.61	6.00	126.33
DB ISLAMIC DB	6.80	0.00	4.13	8.80	7.94	18.88	1.07	7.04	6.62	49.24
EMAR.DU	9.55	-0.83	1.60	9.90	9.52	20.58	1.05	7.08	5.24	84.41
Qatar										
QNB	17.100	0.00	0.00	0.00	0.88	3.45	1.42	10.39	3.83	158.47
INDUSTREIS QAT	12.850	-1.00	-1.00	-1.00	-1.46	-1.76	2.11	14.55	5.45	78.00
QA ISLAMIC BK	20.760	-0.76	-0.76	-0.76	-2.76	-3.44	1.62	11.42	2.95	49.22
MASRAF AL RAYA	2.405	0.00	0.00	0.00	-2.63	-9.42	0.90	15.36	4.16	22.44
MESAEED PETRO	1.530	-0.13	-0.13	-0.13	-6.13	-14.43	1.18	24.01	4.58	19.29
Oman										
BANK MUSCAT	0.253	0.40	0.40	0.40	0.40	-4.17	0.79	9.44	6.13	1.90
OMANTEL	0.916	0.66	0.66	0.66	-7.19	-13.58	1.08	10.84	6.55	0.69
BANK DHOFAR	0.177	0.00	0.00	0.00	12.74	10.63	0.72	19.84	4.38	0.53
NAT BANK OF OMAN	0.278	0.00	0.00	0.00	-4.14	-0.71	0.64	9.48	3.06	0.45
OMINVEST	0.342	0.00	0.00	0.00	-2.84	-13.48	0.72	7.77	5.85	0.23

* GCC Markets performance at the latest close.

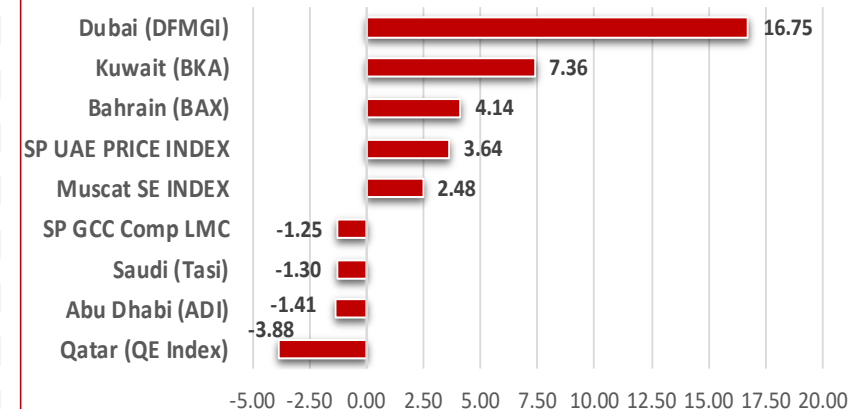
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
20-Nov. 24	24.65%	15.97%	0.06%	3.71%	8.13%	17.80%	13.15%	5.97%	6.01%
27-Nov. 24	24.68%	16.13%	0.06%	3.71%	8.31%	17.77%	13.20%	5.96%	6.02%

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 +0.18 %, the leading sector best performance indices today is Financial Services up by 0.45%.

KSA

Saudi Armco has positive performance today by +0.36%, SABIC has negative performance today by -0.29%, STC has flat performance %, Al Rajhi Bank has positive performance by +1.87%.

UAE

ETISALAT.AD has negative performance today by – 1.78%, FAB.AD has negative performance today by – 1.54 %



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