



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

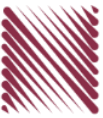
GCC DAILY MORNING BRIEF

Monday, 25th November 2024



DAILY MARKETS WRAP,

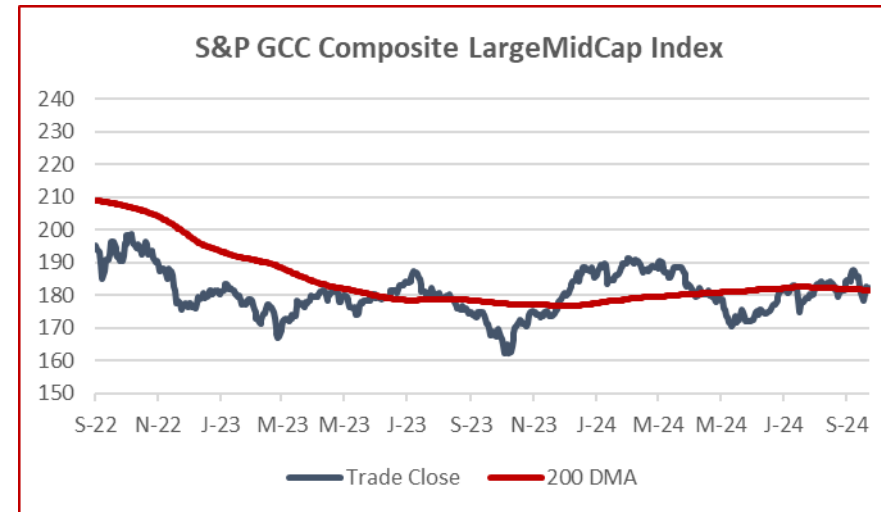
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,864.9	0.21	0.21	-1.31	-2.95	-0.86	2.99	23.08	3.07	10,165.55
Qatar (QE Index)	10,409.6	0.14	0.14	-1.09	-1.93	-3.89	1.22	11.56	4.30	528.44
Dubai (DFMGI)	4,723.6	-0.13	-0.34	2.89	4.89	16.35	1.67	9.34	5.02	706.05
Abu Dhabi (ADI)	9,231.7	-0.88	-2.24	-1.03	-2.06	-3.61	2.69	16.52	2.12	2,638.52
Bahrain (BAX)	2,035.3	0.05	0.05	0.81	1.12	3.24	0.95	9.84	4.41	7.75
Muscat SE INDEX	4,560.4	-1.05	-1.05	-3.98	-3.18	1.03	0.83	9.59	5.98	7.24
SP GCC Comp LMC	183.2	0.16	0.16	0.04	-1.31	-0.95	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	141.4	0.00	0.00	0.72	-0.41	2.57				
Developed Markets										
MSCI World Index	3,766.0	0.33	1.49	3.26	1.15	18.83				
U.S. (S&P 500)	5,969.3	0.35	1.68	4.63	3.59	25.15	4.94	28.13	1.52	53,109.81
U.K. (FTSE 100)	8,262.1	1.38	2.46	1.87	0.31	6.84	1.69	15.64	3.67	2,136.65
Japan (topix)	2,696.5	0.51	-0.56	0.04	1.91	13.95	1.41	14.22	2.31	946,145.74
Emerging Markets										
MSCI EM Index	1,087.3	0.16	0.21	-2.88	-7.14	6.21				
China (SSE Composite)	3,267.2	-3.06	-1.91	-0.39	-2.08	9.82	1.36	12.00		44,025.04
India (Sensex)	79,117.1	2.54	1.98	-0.34	-6.15	9.52	4.21	22.74	1.17	155,345.71

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,303.7	-0.21	-0.21	2.04	2.35	7.13	1.50	15.53	3.64	44.07
Kuwait Premier Index	7,819.4	-0.21	-0.21	1.93	1.44	4.58	1.60	16.41	3.46	35.83
Kuwait Main Index	6,688.7	-0.22	-0.22	2.53	6.56	20.09	1.18	12.28	4.50	8.24
Kuwait Sector										
Banking	1,789.2	-0.26	-0.26	2.46	2.05	8.60	1.78	17.38	3.05	26.87
Telecom	1,013.4	-0.18	-0.18	-0.02	-1.44	-8.31	1.49	12.60	8.28	3.10
Industrials	707.7	-0.32	-0.32	1.33	-2.46	-22.05	0.76	11.74	6.22	2.41
Financial Services	1,468.5	0.36	0.36	1.31	4.10	21.14	1.20	12.56	2.80	4.89
Real Estate	1,390.3	0.29	0.29	-1.34	1.07	14.63	1.07	15.78	2.07	2.94
Basic Materials	963.2	-8.94	-8.94	13.32	19.32	29.13	1.90	13.69	8.28	0.60
Health Care	468.2	0.00	0.00	-0.54	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,005.9	0.89	0.89	-7.50	0.21	52.74	2.16	20.32	2.06	0.30
Insurance	1,996.2	0.50	0.50	-3.38	-4.20	-12.94	1.08	9.84	4.00	0.80
Consumer Discretionary	2,195.6	0.51	0.51	11.05	21.56	36.89				
Energy	1,204.4	1.51	1.51	4.75	7.77	26.91	1.01	9.36	5.34	0.24
Technology	1,113.1	-1.92	-1.92	2.68	-23.12	92.45	1.32			0.02
Utilities	434.2	-0.60	-0.60	6.45	11.49	-4.62				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose on Friday, posting a weekly gain of more than 5%, as the Ukraine war intensified, and Chinese imports were set to increase in November. Brent crude futures climbed 94 cents, or 1.27%, to close at \$75.17 a barrel. West Texas Intermediate, crude futures rose \$1.14, or 1.63%, to settle at \$71.24 per barrel.

Kuwait Market

The market closed down by 0.21% at 7,303.7 value traded 61.2 million KD, Premier market value reached 23.9 million KD down by 0.21% at 7,819.4

KSA Market

The market closed up by 0.21% at 11,864.90.

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	0.878	0.00	0.00	3.29	-0.57	3.12	1.65	12.95	3.85	7.31
KFH	0.741	-0.40	-0.40	2.77	3.49	11.25	2.13	20.20	2.59	12.68
ZAIN	0.463	0.00	0.00	1.54	-2.53	-8.68	1.75	11.20	7.56	2.00
BOUBYAN BANK	0.566	-0.53	-0.53	1.43	-0.70	-0.01	2.29	27.38	1.33	2.38
AGILITY	0.270	-1.10	-1.10	8.43	23.29	-4.67	0.71	11.27	7.41	0.72
Saudi Arabia										
ARAMCO	28.05	0.36	0.36	3.89	3.51	-15.00	4.56	16.55	6.87	6,789.91
SABIC	69.90	0.29	0.29	-3.85	-6.68	-16.29	1.27	84.87	4.72	209.76
STC	40.00	0.13	0.13	-5.10	-8.47	1.66	2.52	15.70	4.00	200.05
AL-RAJHI BANK	93.90	0.43	0.43	6.70	7.68	8.55	3.19	21.46	2.56	375.70
NCB	33.10	0.00	0.00	-0.15	-3.50	-14.36	1.07	9.94	5.44	198.65
Abu Dhabi										
ETISALAT.AD	17.00	-0.58	-2.30	-4.06	-8.11	-13.44	3.42	13.35	4.79	147.84
FAB.AD	12.90	-1.07	-2.86	-1.83	-6.11	-7.59	1.10	8.83	5.50	142.51
EMIRATES NBD	19.50	-1.02	1.04	2.63	-3.94	12.72	1.00	5.47	6.15	123.17
DB ISLAMIC DB	6.53	0.46	-0.46	4.48	3.65	14.16	1.03	6.76	6.89	47.28
EMAR.DU	9.40	-1.05	1.51	8.17	7.80	18.69	1.03	6.97	5.32	83.08
Qatar										
QNB	17.170	0.41	0.41	-1.04	1.30	3.87	1.42	10.43	3.81	158.59
INDUSTREIS QAT	12.910	0.08	0.08	-3.30	-1.00	-1.30	2.12	14.62	5.42	78.11
QA ISLAMIC BK	20.820	0.53	0.53	1.56	-2.48	-3.16	1.62	11.45	2.94	49.20
MASRAF AL RAYA	2.352	0.47	0.47	-0.84	-4.78	-11.41	0.88	15.02	4.25	21.87
MESAEED PETRO	1.533	0.07	0.07	-3.10	-5.95	-14.26	1.19	24.06	4.57	19.26
Oman										
BANK MUSCAT	0.252	-1.18	-1.18	-2.33	0.00	-4.55	0.79	9.40	6.15	1.89
OMANTEL	0.920	-3.16	-3.16	-6.88	-6.79	-13.21	1.09	10.88	6.52	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	0.290	0.00	0.00	-3.33	0.00	3.57	0.67	9.89	2.93	0.47
OMINVEST	0.320	-6.98	-6.98	-12.33	-9.09	-19.05	0.68	7.27	6.25	0.21

* GCC Markets performance at the latest close.

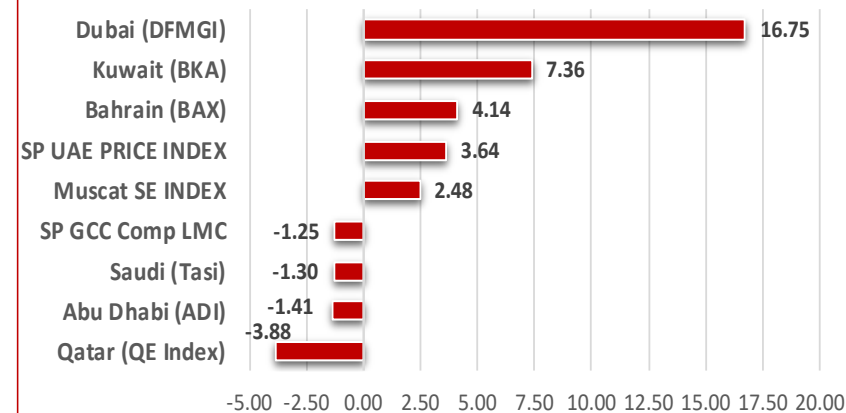
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%
20-Nov. 24	24.65%	15.97%	0.06%	3.71%	8.13%	17.80%	13.15%	5.97%	6.01%

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 down today by -0.21 %, the leading sector best performance indices today is Energy up by 1.5%.

KSA

Saudi Armco has positive performance today by +0.36%, SABIC has positive performance today by + 0.29%, STC has positive performance by + 0.13%, Al Rajhi Bank has positive performance by +0.43%.

UAE

ETISALAT.AD has negative performance today by – 0.58%, FAB.AD has negative performance today by – 1.07 %



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