



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

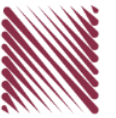
GCC DAILY MORNING BRIEF

Thursday, 28th November 2024



DAILY MARKETS WRAP,

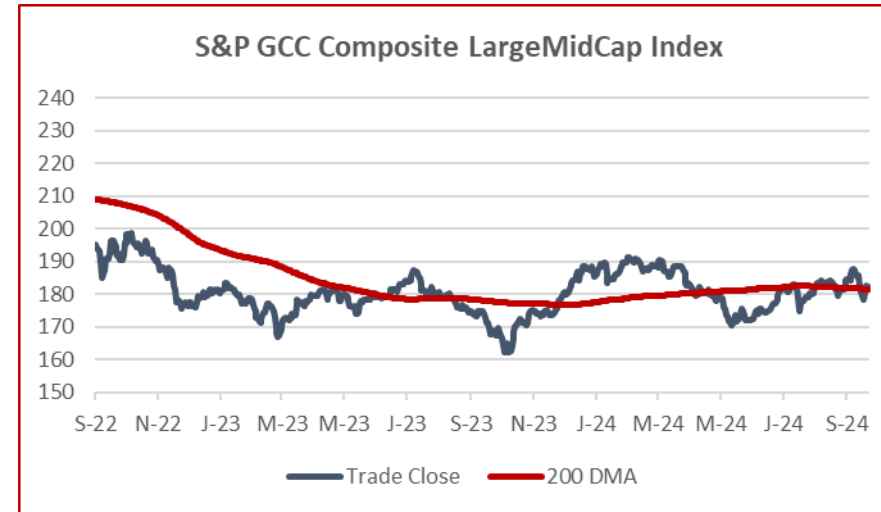
NIC RESEARCH AND STUDIES DEP



* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,590.8	-1.24	-2.11	-3.59	-5.20	-3.15	2.91	22.43	3.15	9,941.49
Qatar (QE Index)	10,361.5	-0.45	-0.32	-1.55	-2.38	-4.33	1.21	11.49	4.33	524.32
Dubai (DFMGI)	4,805.1	-0.49	1.72	4.66	6.70	18.36	1.71	9.58	4.90	719.33
Abu Dhabi (ADI)	9,285.3	-0.09	0.58	-0.46	-1.49	-3.05	2.71	16.59	2.11	2,652.99
Bahrain (BAX)	2,032.0	0.51	-0.11	0.65	0.95	3.07	0.95	9.83	4.41	7.74
Muscat SE INDEX	4,530.4	-0.49	-1.70	-4.61	-3.82	0.36	0.82	9.53	6.01	7.21
SP GCC Comp LMC	180.8	-1.07	-1.17	-1.28	-2.62	-2.27	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.9	-0.44	1.80	2.53	1.39	4.42				
Developed Markets										
MSCI World Index	3,786.0	-0.11	0.53	3.81	1.69	19.46				
U.S. (S&P 500)	5,998.7	-0.38	0.49	5.14	4.10	25.76	4.99	28.39	1.50	53,622.32
U.K. (FTSE 100)	8,274.8	0.20	0.15	2.03	0.46	7.00	1.70	15.65	3.67	2,140.36
Japan (topix)	2,665.3	-0.90	-1.16	-1.12	0.73	12.63	1.40	14.06	2.34	936,085.49
Emerging Markets										
MSCI EM Index	1,087.6	0.06	0.03	-2.85	-7.11	6.24				
China (SSE Composite)	3,309.8	1.53	1.30	0.91	-0.80	11.26	1.36	12.00		44,025.04
India (Sensex)	80,234.1	0.29	1.41	1.06	-4.82	11.07	4.27	23.06	1.15	157,273.23

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,232.8	-0.40	-1.18	1.05	1.35	6.09	1.50	15.32	3.66	43.73
Kuwait Premier Index	7,751.4	-0.45	-1.08	1.04	0.55	3.67	1.60	16.28	3.48	35.60
Kuwait Main Index	6,593.9	-0.17	-1.63	1.08	5.05	18.39	1.16	11.86	4.56	8.12
Kuwait Sector										
Banking	1,769.3	-0.50	-1.37	1.32	0.92	7.39	1.77	17.23	3.08	26.64
Telecom	1,008.6	-0.27	-0.65	-0.49	-1.90	-8.74	1.48	12.55	8.31	3.09
Industrials	705.1	-0.74	-0.69	0.95	-2.83	-22.34	0.80	11.49	6.22	2.41
Financial Services	1,457.3	-0.37	-0.40	0.54	3.31	20.22	1.20	12.22	2.81	4.89
Real Estate	1,390.9	0.05	0.33	-1.30	1.11	14.67	1.07	15.82	2.06	2.95
Basic Materials	959.1	4.01	-9.33	12.84	18.81	28.58	1.66	11.93	9.50	0.52
Health Care	468.2	0.00	0.00	-0.54	-0.54	-2.90	1.57	15.09	2.24	
Consumer Staples	1,000.1	-0.48	0.31	-8.04	-0.38	51.85	2.18	20.48	2.05	0.31
Insurance	1,982.4	0.17	-0.19	-4.04	-4.86	-13.54	1.08	9.81	4.01	0.80
Consumer Discretionary	2,113.0	-1.51	-3.27	6.87	16.98	31.74				
Energy	1,197.2	1.85	0.91	4.13	7.13	26.15	1.00	9.19	5.39	0.24
Technology	1,091.3	0.67	-3.85	0.67	-24.62	88.68	1.26			0.01
Utilities	431.6	-0.61	-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 lower in Asian trading on Thursday, after a surprise jump in U.S. gasoline stocks ahead of the nation's Thanksgiving holiday sparked worry over demand in the top consumer of the motor fuel.

Brent crude futures LCOcI fell by 4 cents, or 0.1%, to \$72.79 per barrel by 0220 GMT, while U.S. West Texas Intermediate crude futures CLcI were a cent lower at \$68.71 a barrel.

Kuwait Market

The market closed -0.40 % at 7,232.8 value traded 76.1 million KD, Premier market value reached 42.6 million KD down by 0.45% at 7,751.4

KSA Market

The market closed down by -1.24% at 11,590.8.

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	0.869	-0.11	-1.03	2.24	-1.59	2.06	1.64	12.82	3.89	7.22
KFH	0.735	-0.27	-1.21	1.94	2.65	10.35	2.11	20.04	2.61	12.54
ZAIN	0.460	-0.43	-0.65	0.88	-3.16	-9.27	1.73	11.13	7.61	1.99
BOUBYAN BANK	0.546	-3.19	-4.04	-2.15	-4.21	-3.54	2.21	26.42	1.38	2.29
AGILITY	0.265	-1.85	-2.93	6.43	21.00	-6.43	0.69	11.06	7.55	0.71
Saudi Arabia										
ARAMCO	27.45	-0.18	-1.79	1.67	1.29	-16.82	4.46	16.20	7.02	6,639.72
SABIC	68.00	-0.87	-2.44	-6.46	-9.21	-18.56	1.23	82.57	4.85	203.90
STC	39.80	-0.50	-0.38	-5.58	-8.92	1.15	2.50	15.63	4.02	198.90
AL-RAJHI BANK	91.00	-1.94	-2.67	3.41	4.36	5.20	3.09	20.80	2.64	363.83
NCB	32.00	-2.44	-3.32	-3.47	-6.71	-17.21	1.04	9.61	5.63	191.91
Abu Dhabi										
ETISALAT.AD	17.02	-0.58	0.12	-3.95	-8.00	-13.34	3.43	13.37	4.79	148.03
FAB.AD	13.20	-0.15	2.33	0.46	-3.93	-5.44	1.13	9.03	5.38	145.84
EMIRATES NBD	19.80	-3.41	1.54	4.21	-2.46	14.45	1.02	5.55	6.06	125.08
DB ISLAMIC DB	6.75	-0.74	3.37	8.00	7.14	18.01	1.06	6.99	6.67	48.88
EMAR.DU	9.66	-1.33	2.77	11.16	10.78	21.97	1.06	7.17	5.18	85.39
Qatar										
QNB	16.860	-0.94	-1.40	-2.82	-0.53	2.00	1.40	10.25	3.88	155.72
INDUSTREIS QAT	12.810	-0.47	-0.70	-4.04	-1.76	-2.06	2.10	14.51	5.46	77.50
QA ISLAMIC BK	20.860	0.05	0.72	1.76	-2.30	-2.98	1.62	11.47	2.94	49.29
MASRAF AL RAYA	2.388	0.55	2.01	0.67	-3.32	-10.06	0.89	15.25	4.19	22.21
MESAEED PETRO	1.543	-1.09	0.72	-2.47	-5.34	-13.70	1.19	24.22	4.54	19.38
Oman										
BANK MUSCAT	0.254	-0.39	-0.39	-1.55	0.79	-3.79	0.79	9.47	6.10	1.91
OMANTEL	0.909	-0.66	-4.32	-8.00	-7.90	-14.25	1.07	10.75	6.60	0.68
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	0.280	-3.45	-3.45	-6.67	-3.45	0.00	0.65	9.55	3.04	0.46
OMINVEST	0.334	1.52	-2.91	-8.49	-5.11	-15.51	0.71	7.59	5.99	0.22

* GCC Markets performance at the latest close.

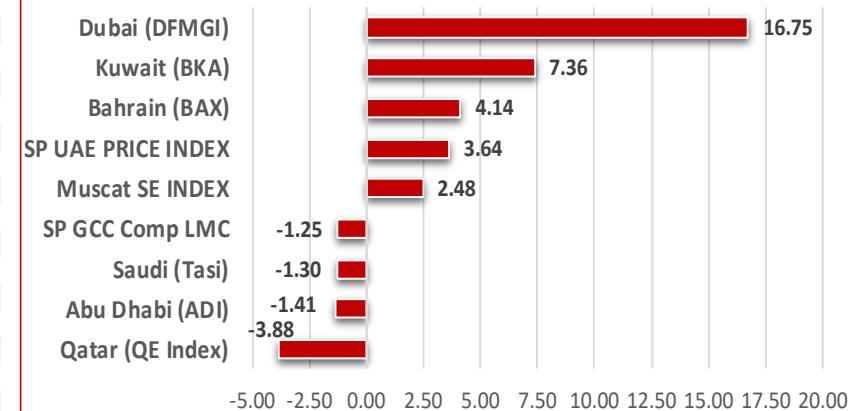
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
13-Nov. 24	24.65%	15.95%	0.06%	3.72%	8.05%	17.74%	13.12%	6.04%	6.03%
20-Nov. 24	24.65%	15.97%	0.06%	3.71%	8.13%	17.80%	13.15%	5.97%	6.01%

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 -0.40 %, the leading sector best performance indices today is Energy staples up by 1.9%.

KSA

Saudi Armco has negative performance today by -0.18%, SABIC has negative performance today by -0.87%, STC has negative performance by -0.51%, Al Rajhi Bank has negative performance by -1.94%.

UAE

ETISALAT.AD has negative performance today by – 0.58%, FAB.AD has negative performance today by – 0.15 %



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