



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 11th February 2025



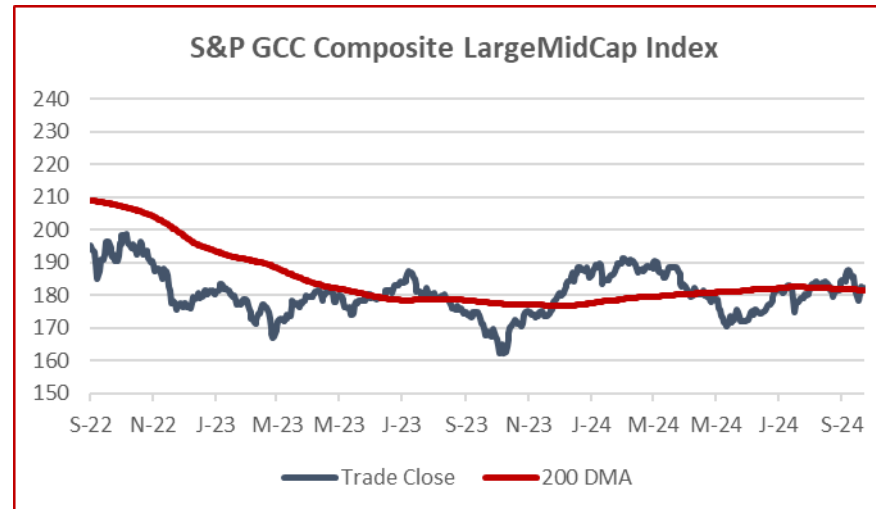


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,471.7	0.02	0.31	0.45	3.62	3.62	2.28	19.69	3.40	10,278.02
Qatar (QE Index)	10,629.2	0.43	0.13	-0.35	0.55	0.55	1.21	11.59	4.56	535.58
Dubai (DFMGI)	5,261.3	0.44	0.44	1.56	1.99	1.99	1.81	10.55	4.44	793.61
Abu Dhabi (ADI)	9,631.2	0.47	0.47	0.47	2.25	2.25	2.70	16.91	2.14	2,749.63
Bahrain (BAX)	1,887.1	-0.04	0.29	0.40	-4.98	-4.98	0.86	8.77	4.85	7.18
Muscat SE INDEX	4,533.1	-0.39	-0.68	-0.22	-0.95	-0.95	0.80	9.47	5.96	7.28
SP GCC Comp LMC	194.3	0.00	0.22	0.69	3.41	3.41	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.0	0.00	0.00	0.73	3.12	3.12				

Developed Markets										
MSCI World Index	3,854.1	0.55	0.55	0.46	3.94	3.94				
U.S. (S&P 500)	6,066.4	0.67	0.67	0.43	3.14	3.14	4.92	26.93	1.52	53,885.73
U.K. (FTSE 100)	8,767.8	0.77	0.77	1.08	7.28	7.28	1.77	16.49	3.50	2,261.83
Japan (topix)	2,733.0	-0.15	-0.15	-2.00	-1.86	-1.86	1.43	13.74	2.28	953,381.66
Emerging Markets										
MSCI EM Index	1,108.5	0.00	0.00	1.38	3.07	3.07				
China (SSE Composite)	3,322.2	0.56	0.56	2.20	-0.88	-0.88	1.36	12.00		44,025.04
India (Sensex)	77,311.8	-0.70	-0.70	-0.24	-1.06	-1.06	4.18	21.79	1.16	152,133.95

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,944.2	0.32	0.62	2.05	7.90	7.90	1.63	15.51	3.37	47.70
Kuwait Premier Index	8,469.8	0.41	0.55	2.04	8.05	8.05	1.73	16.14	3.21	38.56
Kuwait Main Index	7,409.8	-0.08	0.91	2.11	7.28	7.28	1.31	13.12	4.08	9.14
Kuwait Sector										
Banking	1,976.9	0.44	0.56	1.80	9.23	9.23	1.95	16.90	2.78	29.49
Telecom	1,066.8	1.00	0.91	5.30	4.82	4.82	1.57	12.40	7.96	3.23
Industrials	740.0	-1.81	-0.81	0.47	2.26	2.26	0.84	11.98	5.73	2.55
Financial Services	1,551.9	0.42	1.66	0.89	2.73	2.73	1.27	12.95	2.71	5.16
Real Estate	1,520.8	-0.07	-0.05	1.20	12.39	12.39	1.14	17.43	1.88	3.23
Basic Materials	916.3	-0.22	-0.46	3.97	0.55	0.55	1.65	11.88	9.54	0.52
Health Care	408.5	-3.20	-8.91	-11.90	-10.88	-10.88	1.41	13.60	2.48	
Consumer Staples	1,044.6	2.21	1.57	1.26	4.60	4.60	2.22	20.83	2.01	0.31
Insurance	2,094.5	-0.60	-0.40	2.58	1.91	1.91	1.15	10.45	3.76	0.85
Consumer Discretionary	2,491.4	0.66	2.91	9.11	17.37	17.37				
Energy	1,375.7	2.54	2.07	3.55	15.68	15.68	1.11	10.26	4.73	0.27
Technology	1,018.5	0.00	1.45	-2.78	-2.10	-2.10	1.18			0.01
Utilities	410.5	1.96	1.96	2.63	3.31	3.31				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were steady on Tuesday as traders digested another round of trade tariffs, this time a 25% levy on all U.S. imports of steel and aluminum, which could weigh on global economic and energy demand in the world's biggest oil consumer. Brent crude futures were up 11 cents, or 0.14%, at \$75.98 a barrel by 0128 GMT, while U.S. West Texas Intermediate crude rose 5 cents or 0.07% to \$72.37.

Kuwait Market

The market closed up by 0.32% at 7,944.2 value traded 194.6 million KD, Premier market value reached 70.8 million KD, closed up by 0.41% at 8,469.8

KSA Market

The market closed up by 0.02% at 12,471.7

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	0.995	0.71	1.32	3.22	11.05	11.05	1.82	14.33	3.40	8.28
KFH	0.796	0.38	0.25	1.27	6.70	6.70	2.23	17.16	2.41	13.62
ZAIN	0.484	2.11	1.26	6.61	3.20	3.20	1.82	11.71	7.23	2.09
BOUBYAN BANK	0.640	0.31	0.00	1.91	14.08	14.08	2.53	29.62	1.18	2.69
AGILITY	0.253	-2.32	-1.17	0.40	2.43	2.43	0.66	10.56	7.91	0.68
Saudi Arabia										
ARAMCO	27.75	0.36	0.36	-0.18	-1.07	-1.07	4.51	16.37	6.94	6,714.60
SABIC	67.80	-0.15	-0.15	1.19	1.19	1.19	1.23	82.32	5.01	203.37
STC	44.15	0.34	0.00	1.49	10.38	10.38	2.78	17.33	3.62	220.72
AL-RAJHI BANK	101.00	-0.20	1.10	2.02	6.77	6.77	3.28	21.62	2.38	403.95
NCB	34.15	-1.30	-0.58	-0.15	2.25	2.25	1.05	9.94	5.56	204.87
Abu Dhabi										
ETISALAT.AD	17.16	-0.23	-0.23	0.35	5.15	5.15	3.46	13.48	4.75	149.24
FAB.AD	14.40	1.98	1.98	-0.96	4.80	4.80	1.22	9.75	5.21	159.00
EMIRATES NBD	21.30	0.47	0.47	2.16	-0.70	-0.70	1.07	5.98	4.69	134.55
DB ISLAMIC DB	7.76	0.78	0.78	0.78	9.45	9.45	1.22	8.04	5.80	56.19
EMAR.DU	13.80	1.10	1.10	2.22	7.39	7.39	1.51	10.24	3.62	121.98
Qatar										
QNB	16.580	0.30	-0.12	-0.72	-4.11	-4.11	1.36	9.83	4.22	152.83
INDUSTREIS QAT	13.320	0.15	0.15	-2.99	0.38	0.38	2.13	17.95	5.56	80.42
QA ISLAMIC BK	20.940	1.01	0.53	1.65	-1.97	-1.97	1.59	11.28	3.82	49.38
MASRAF AL RAYA	2.378	0.25	0.00	-0.42	-3.45	-3.45	0.88	15.14	4.21	22.07
MESAIEED PETRO	1.475	-0.54	-1.14	-3.59	-1.34	-1.34	1.13	25.78	3.86	18.49
Oman										
BANK MUSCAT	0.258	-0.77	0.00	0.78	2.38	2.38	0.79	9.59	6.01	1.94
OMANTEL	0.893	-0.22	-0.78	-0.67	-5.00	-5.00	1.06	10.57	6.72	0.67
BANK DHOFAR	0.151	0.00	0.00	0.00	-3.21	-3.21	0.61	13.71	5.30	0.45
NAT BANK OF OMAN	0.290	0.00	0.00	-1.36	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.330	-0.30	-1.49	0.00	0.00	0.00	0.70	7.50	6.06	0.22

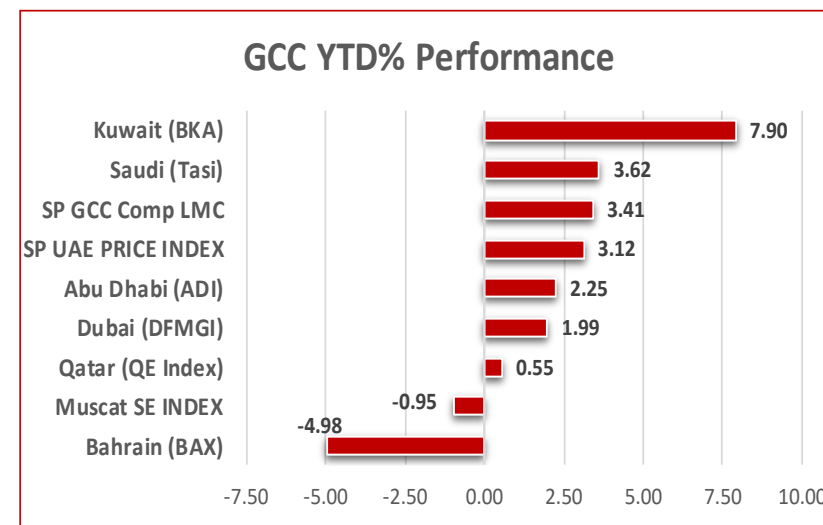
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
29-Jan. 25	24.78%	15.04%	0.06%	3.86%	9.31%	17.92%	13.29%	6.39%	6.42%
5-Feb. 25	24.96%	15.38%	0.06%	3.97%	9.24%	17.97%	13.31%	6.41%	6.46%

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 0.32%, the best performing sector today is energy at 2.54%.

KSA

Aramco had a positive performance today at 0.36%, Sabic had a negative performance at -0.15%, STC had a positive performance at 0.34%, Al Rajhi Bank had a negative performance at -0.20%.

UAE

ETISALAT.AD had a negative performance today at -0.23%, FAB.AD had a positive performance at 1.98%.



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