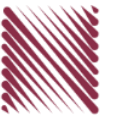


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

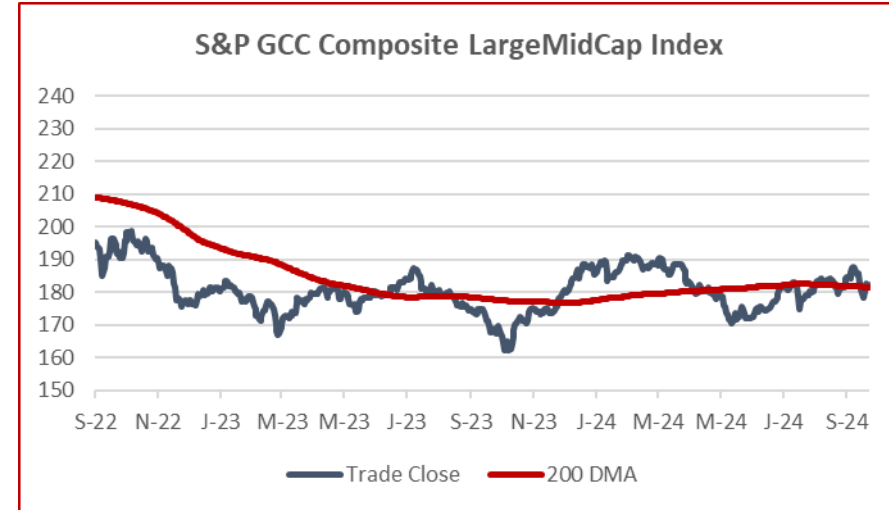
Sunday, 12<sup>th</sup> January 2025





| * 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)             | 12,097.8    | 0.07  | -0.04 | 0.51  | 0.51  | 0.51  | 2.42 | 20.52 | 3.33           | 10,200.78             |
| Qatar (QE Index)         | 10,441.5    | -0.14 | -1.23 | -1.23 | -1.23 | -1.23 | 1.22 | 11.57 | 4.30           | 528.65                |
| Dubai (DFMGI)            | 5,228.3     | -0.02 | 1.98  | 1.35  | 1.35  | 1.35  | 1.87 | 10.49 | 4.49           | 789.38                |
| Abu Dhabi (ADI)          | 9,495.5     | 0.35  | 1.85  | 0.81  | 0.81  | 0.81  | 2.75 | 16.77 | 2.06           | 2,718.16              |
| Bahrain (BAX)            | 1,973.5     | -0.23 | -0.29 | -0.63 | -0.63 | -0.63 | 0.91 | 9.47  | 4.57           | 7.52                  |
| Muscat SE INDEX          | 4,597.9     | 0.02  | 0.54  | 0.47  | 0.47  | 0.47  | 0.84 | 9.74  | 5.88           | 7.36                  |
| SP GCC Comp LMC          | 189.2       | 0.10  | 0.42  | 0.71  | 0.71  | 0.71  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 154.6       | 0.46  | 2.91  | 1.52  | 1.52  | 1.52  |      |       |                |                       |
| <b>Developed Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| MSCI World Index         | 3,678.2     | -1.44 | -1.59 | -0.80 | -0.80 | -0.80 |      |       |                |                       |
| U.S. (S&P 500)           | 5,827.0     | -1.54 | -1.94 | -0.93 | -0.93 | -0.93 | 4.83 | 27.51 | 1.56           | 52,105.70             |
| U.K. (FTSE 100)          | 8,248.5     | -0.86 | 0.30  | 0.92  | 0.92  | 0.92  | 1.66 | 15.77 | 3.71           | 2,133.87              |
| Japan (topix)            | 2,714.1     | -0.80 | -2.54 | -2.54 | -2.54 | -2.54 | 1.42 | 14.35 | 2.29           | 951,285.69            |
| <b>Emerging Markets</b>  |             |       |       |       |       |       |      |       |                |                       |
| MSCI EM Index            | 1,057.1     | -0.88 | -1.50 | -1.71 | -1.71 | -1.71 |      |       |                |                       |
| China (SSE Composite)    | 3,168.5     | -1.33 | -1.34 | -5.47 | -5.47 | -5.47 | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 77,378.9    | -0.31 | -2.33 | -0.97 | -0.97 | -0.97 | 4.18 | 22.48 | 1.20           | 152,639.44            |
|                          |             |       |       |       |       |       |      |       |                |                       |
| 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   | 7,542.3     | 0.75  | 2.44  | 2.44  | 2.44  | 2.44  | 1.55 | 15.92 | 3.82           | 45.43                 |
| Kuwait Premier Index     | 8,024.4     | 0.64  | 2.37  | 2.37  | 2.37  | 2.37  | 1.65 | 16.77 | 3.72           | 36.68                 |
| Kuwait Main Index        | 7,097.9     | 1.18  | 2.76  | 2.76  | 2.76  | 2.76  | 1.25 | 12.87 | 4.26           | 8.75                  |
| <b>Kuwait Sector</b>     |             |       |       |       |       |       |      |       |                |                       |
| Banking                  | 1,870.4     | 1.15  | 3.35  | 3.35  | 3.35  | 3.35  | 1.86 | 18.12 | 2.93           | 28.04                 |
| Telecom                  | 1,021.1     | 0.19  | 0.33  | 0.33  | 0.33  | 0.33  | 1.50 | 12.67 | 8.23           | 3.12                  |
| Industrials              | 737.2       | 0.41  | 1.87  | 1.87  | 1.87  | 1.87  | 0.83 | 11.96 | 10.83          | 2.50                  |
| Financial Services       | 1,526.9     | 0.15  | 1.08  | 1.08  | 1.08  | 1.08  | 1.25 | 12.82 | 2.73           | 5.10                  |
| Real Estate              | 1,376.6     | 0.22  | 1.73  | 1.73  | 1.73  | 1.73  | 1.06 | 15.56 | 2.06           | 2.92                  |
| Basic Materials          | 894.1       | -0.87 | -1.88 | -1.88 | -1.88 | -1.88 | 1.61 | 11.57 | 9.80           | 0.50                  |
| Health Care              | 458.3       | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 1.53 | 14.77 | 2.29           |                       |
| Consumer Staples         | 1,005.2     | 0.07  | 0.65  | 0.65  | 0.65  | 0.65  | 2.18 | 20.48 | 2.04           | 0.31                  |
| Insurance                | 1,992.2     | -1.35 | -3.07 | -3.07 | -3.07 | -3.07 | 1.09 | 9.88  | 3.98           | 0.81                  |
| Consumer Discretionary   | 2,195.4     | 0.45  | 3.42  | 3.42  | 3.42  | 3.42  |      |       |                |                       |
| Energy                   | 1,195.3     | -0.01 | 0.52  | 0.52  | 0.52  | 0.52  | 1.02 | 9.33  | 5.31           | 0.24                  |
| Technology               | 1,084.0     | 1.36  | 4.20  | 4.20  | 4.20  | 4.20  | 1.26 |       |                | 0.01                  |
| Utilities                | 394.7       | -1.32 | -0.66 | -0.66 | -0.66 | -0.66 |      |       |                |                       |

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



### What Move the GCC markets

#### Oil Prices

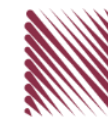
Oil prices jumped on Friday as the U.S. Treasury Department announced sweeping sanctions against Russia's oil industry. Brent gained \$2.84, or 3.69%, to close at \$79.76 per barrel, while U.S. crude oil advanced \$2.65, or 3.58%, to settle at \$76.57 per barrel. The benchmarks closed at their highest levels since October.

#### Kuwait Market

The market closed up by 0.75% at 7,542.3 value traded 97.0 million KD, Premier market value reached 74.5 million KD up by 0.64% at 8,024.4.

#### KSA Market

The market closed up by 0.07% at 12,097.8



| * 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                    | 0.925       | 1.09  | 3.24  | 3.24  | 3.24  | 3.24  | 1.74 | 13.64 | 3.66           | 7.70                  |
| KFH                    | 0.757       | 0.26  | 1.47  | 1.47  | 1.47  | 1.47  | 2.18 | 20.64 | 2.53           | 12.95                 |
| ZAIN                   | 0.462       | 0.00  | -1.49 | -1.49 | -1.49 | -1.49 | 1.74 | 11.18 | 7.58           | 2.00                  |
| BOUBYAN BANK           | 0.596       | 1.02  | 6.24  | 6.24  | 6.24  | 6.24  | 2.41 | 28.83 | 1.27           | 2.50                  |
| AGILITY                | 0.257       | -1.15 | 4.05  | 4.05  | 4.05  | 4.05  | 0.67 | 10.73 | 7.78           | 0.69                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |       |      |       |                |                       |
| ARAMCO                 | 27.95       | -0.18 | -0.36 | -0.36 | -0.36 | -0.36 | 4.54 | 16.49 | 6.89           | 6,763.90              |
| SABIC                  | 66.50       | 0.00  | -0.60 | -0.75 | -0.75 | -0.75 | 1.21 | 80.74 | 5.11           | 199.50                |
| STC                    | 41.00       | 0.37  | 0.37  | 2.50  | 2.50  | 2.50  | 2.58 | 16.10 | 3.90           | 205.00                |
| AL-RAJHI BANK          | 95.80       | 0.00  | -2.74 | 1.27  | 1.27  | 1.27  | 3.25 | 21.90 | 2.51           | 383.20                |
| NCB                    | 33.55       | 0.15  | 0.90  | 0.45  | 0.45  | 0.45  | 1.09 | 10.07 | 5.37           | 201.30                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |       |      |       |                |                       |
| ETISALAT.AD            | 16.38       | -0.73 | 0.74  | -0.37 | -0.37 | -0.37 | 3.27 | 12.77 | 5.01           | 141.41                |
| FAB.AD                 | 14.34       | 1.12  | 8.21  | 5.53  | 5.53  | 5.53  | 1.24 | 9.92  | 4.90           | 160.19                |
| EMIRATES NBD           | 21.55       | -0.23 | 5.12  | 0.47  | 0.47  | 0.47  | 1.11 | 6.04  | 5.57           | 136.12                |
| DB ISLAMIC DB          | 7.28        | -0.27 | 3.70  | 2.68  | 2.68  | 2.68  | 1.14 | 7.54  | 6.18           | 52.71                 |
| EMAR.DU                | 13.00       | 1.56  | 3.17  | 1.17  | 1.17  | 1.17  | 1.43 | 9.64  | 3.85           | 114.90                |
| <b>Qatar</b>           |             |       |       |       |       |       |      |       |                |                       |
| QNB                    | 16.880      | -0.82 | -2.37 | -2.37 | -2.37 | -2.37 | 1.40 | 10.26 | 3.88           | 155.91                |
| INDUSTREIS QAT         | 13.150      | 0.00  | -0.90 | -0.90 | -0.90 | -0.90 | 2.16 | 14.89 | 5.32           | 79.56                 |
| QA ISLAMIC BK          | 20.700      | 0.00  | -3.09 | -3.09 | -3.09 | -3.09 | 1.61 | 11.38 | 2.96           | 48.91                 |
| MASRAF AL RAYA         | 2.462       | -0.32 | -0.04 | -0.04 | -0.04 | -0.04 | 0.92 | 15.72 | 4.06           | 22.90                 |
| MESAIEED PETRO         | 1.465       | -0.75 | -2.01 | -2.01 | -2.01 | -2.01 | 1.13 | 22.99 | 4.78           | 18.41                 |
| <b>Oman</b>            |             |       |       |       |       |       |      |       |                |                       |
| BANK MUSCAT            | 0.257       | 0.00  | 1.58  | 1.98  | 1.98  | 1.98  | 0.80 | 9.59  | 6.03           | 1.93                  |
| OMANTEL                | 0.924       | 1.54  | -0.22 | -1.70 | -1.70 | -1.70 | 1.09 | 10.93 | 6.49           | 0.69                  |
| BANK DHOFAR            | 0.156       | 0.00  | 0.00  | 0.00  | 0.00  | 0.00  | 0.64 | 17.49 | 4.97           | 0.47                  |
| NAT BANK OF OMAN       | 0.293       | 0.00  | -0.68 | -1.01 | -1.01 | -1.01 | 0.68 | 9.99  | 2.90           | 0.48                  |
| OMINVEST               | 0.329       | 0.30  | 0.00  | -0.30 | -0.30 | -0.30 | 0.70 | 7.47  | 6.08           | 0.22                  |

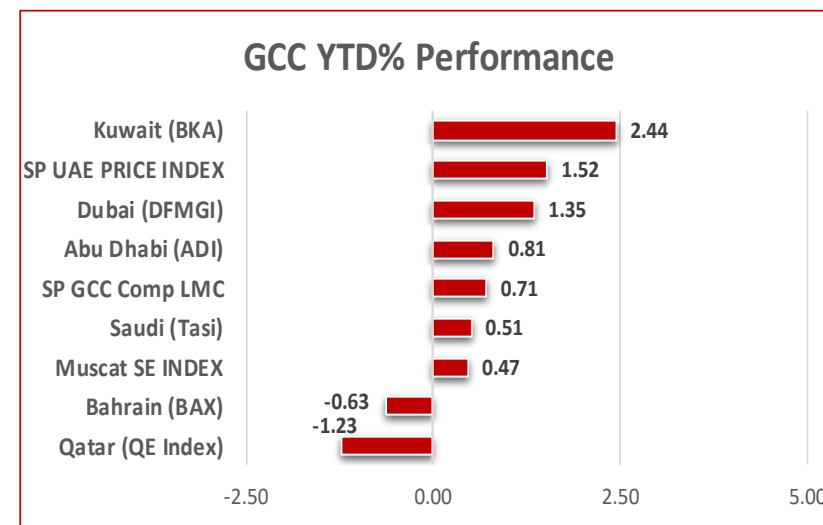
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 01-Jan. 25      | 24.72% | 15.85% | 0.06% | 3.74% | 8.58% | 17.80% | 13.28% | 5.93%   | 6.09% |
| 08-Jan. 25      | 24.73% | 15.92% | 0.06% | 3.76% | 8.72% | 17.86% | 13.27% | 5.94%   | 6.10% |

### End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , LSEG , NIC



\* GCC Markets performance at the latest close.

### Kuwait

The market is up today by 0.75%, the best performing sector today is technology at 1.36%.

### KSA

Saudi Armco had a negative performance today at -0.18%, SABIC had a flat performance , STC had a positive performance today at 0.37%, Al Rajhi Bank had a flat performance today.

### UAE

ETISALAT.AD had a negative performance today by -0.73%, FAB.AD had a positive performance today at 1.12%.



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)