

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 13th February 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

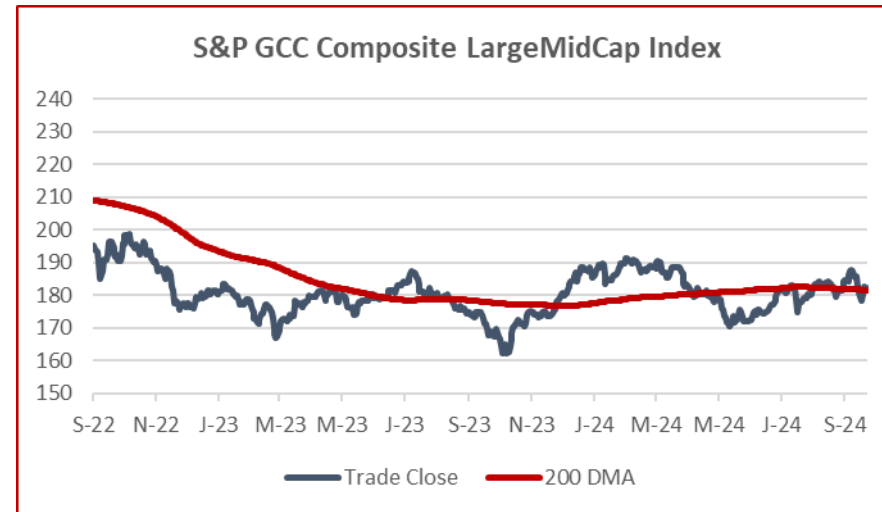


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,385.7	-0.31	-0.39	-0.24	2.90	2.90	2.25	19.54	3.43	10,259.85
Qatar (QE Index)	10,595.2	-0.32	-0.19	-0.67	0.23	0.23	1.20	11.46	4.61	534.26
Dubai (DFMGI)	5,304.2	-0.59	1.26	2.39	2.82	2.82	1.79	10.49	4.41	798.28
Abu Dhabi (ADI)	9,659.0	0.21	0.76	0.76	2.55	2.55	2.69	18.79	2.14	2,749.16
Bahrain (BAX)	1,891.6	-0.36	0.53	0.64	-4.75	-4.75	0.86	8.71	5.07	7.19
Muscat SE INDEX	4,486.4	-0.80	-1.71	-1.25	-1.97	-1.97	0.79	9.35	6.02	7.20
SP GCC Comp LMC	194.6	0.00	0.37	0.84	3.57	3.57	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	159.8	0.00	1.78	2.52	4.95	4.95				

Developed Markets										
MSCI World Index	3,848.2	-0.18	0.40	0.30	3.78	3.78				
U.S. (S&P 500)	6,052.0	-0.27	0.43	0.19	2.90	2.90	4.95	27.08	1.51	54,241.46
U.K. (FTSE 100)	8,807.4	0.34	1.23	1.54	7.76	7.76	1.78	16.84	3.50	2,271.04
Japan (topix)	2,733.3	0.01	-0.14	-1.98	-1.85	-1.85	1.43	13.96	2.29	954,113.27
Emerging Markets										
MSCI EM Index	1,111.0	0.58	0.23	1.61	3.30	3.30				
China (SSE Composite)	3,346.4	0.85	1.29	2.95	-0.16	-0.16	1.36	12.00		44,025.04
India (Sensex)	76,171.1	-0.16	-2.17	-1.72	-2.52	-2.52	4.12	21.47	1.18	149,805.25

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,974.2	0.19	1.00	2.43	8.31	8.31	1.64	15.60	3.37	47.94
Kuwait Premier Index	8,514.3	0.31	1.08	2.57	8.62	8.62	1.77	16.51	3.23	39.13
Kuwait Main Index	7,388.1	-0.40	0.61	1.81	6.96	6.96	1.22	12.22	4.02	8.81
Kuwait Sector										
Banking	1,989.3	0.36	1.19	2.44	9.92	9.92	1.96	17.05	2.80	29.70
Telecom	1,066.9	0.12	0.92	5.31	4.83	4.83	1.58	12.51	7.89	3.26
Industrials	746.1	0.35	0.01	1.31	3.10	3.10	0.83	11.79	5.81	2.52
Financial Services	1,549.3	-0.37	1.49	0.73	2.57	2.57	1.27	13.04	2.69	5.19
Real Estate	1,533.7	0.29	0.80	2.06	13.35	13.35	1.15	17.53	1.87	3.25
Basic Materials	914.9	0.10	-0.62	3.81	0.40	0.40	1.64	11.83	9.58	0.52
Health Care	417.8	4.05	-6.82	-9.87	-8.83	-8.83	1.34	12.95	2.61	
Consumer Staples	1,010.0	-1.73	-1.80	-2.09	1.14	1.14	2.23	20.95	2.00	0.31
Insurance	2,088.7	-2.12	-0.68	2.30	1.63	1.63	1.16	10.58	3.71	0.86
Consumer Discretionary	2,444.5	-0.02	0.97	7.05	15.15	15.15				
Energy	1,363.0	-1.46	1.12	2.60	14.62	14.62	1.15	10.47	4.59	0.28
Technology	1,054.9	-2.03	5.07	0.69	1.40	1.40	1.25			0.01
Utilities	407.9	-0.64	1.31	1.97	2.65	2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell on Thursday on expectations a potential peace deal between Ukraine and Russia would mean the end of sanctions that have disrupted supply flows and U.S. President Donald Trump's intention to introduce reciprocal tariffs stoked inflation jitters. Brent futures were down 55 cents, or 0.73%, at \$74.63 a barrel by 0141 GMT while U.S. West Texas Intermediate (WTI) crude dropped 52 cents, or 0.73%, to \$70.85.

Kuwait Market

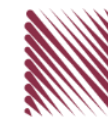
The market closed up by 0.19% at 7,974.2 value traded 134.5 million KD, Premier market value reached 70.7 million KD, closed up by 0.31% at 8,514.3

KSA Market

The market closed down by -0.31% at 12,385.7.

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	1.004	0.60	2.24	4.15	12.05	12.05	1.84	14.46	3.49	8.36
KFH	0.796	0.13	0.25	1.27	6.70	6.70	2.23	17.16	2.41	13.62
ZAIN	0.484	0.83	1.26	6.61	3.20	3.20	1.82	11.71	7.23	2.10
BOUBYAN BANK	0.652	0.46	1.88	3.82	16.22	16.22	2.58	30.17	1.16	2.74
AGILITY	0.259	1.97	1.17	2.78	4.86	4.86	0.68	10.81	7.72	0.69
Saudi Arabia										
ARAMCO	27.80	0.18	0.54	0.00	-0.89	-0.89	4.52	16.40	6.93	6,728.50
SABIC	66.60	-1.77	-1.91	-0.60	-0.60	-0.60	1.21	80.87	5.11	199.83
STC	44.00	0.57	-0.34	1.15	10.00	10.00	2.77	17.27	3.64	220.03
AL-RAJHI BANK	99.60	0.10	-0.30	0.61	5.29	5.29	3.24	21.32	2.41	398.45
NCB	33.90	-0.15	-1.31	-0.88	1.50	1.50	1.05	9.86	5.60	203.43
Abu Dhabi										
ETISALAT.AD	16.98	-0.24	-1.28	-0.70	4.04	4.04	3.42	13.34	4.80	147.67
FAB.AD	14.42	1.26	2.12	-0.83	4.95	4.95	1.22	9.76	5.20	159.21
EMIRATES NBD	21.50	-0.92	1.42	3.12	0.23	0.23	1.08	6.04	4.65	135.80
DB ISLAMIC DB	7.60	-4.04	-1.30	-1.30	7.19	7.19	1.10	7.31	5.92	55.03
EMAR.DU	14.05	-1.06	2.93	4.07	9.34	9.34	1.54	10.42	3.56	124.18
Qatar										
QNB	16.580	0.00	-0.12	-0.72	-4.11	-4.11	1.36	9.83	4.22	153.14
INDUSTREIS QAT	13.200	-0.90	-0.75	-3.86	-0.53	-0.53	2.12	17.79	5.61	79.86
QA ISLAMIC BK	20.900	-0.19	0.34	1.46	-2.15	-2.15	1.59	11.26	3.83	49.39
MASRAF AL RAYA	2.377	-0.04	-0.04	-0.46	-3.49	-3.49	0.88	15.13	4.21	22.11
MESAIEED PETRO	1.470	-0.34	-1.47	-3.92	-1.67	-1.67	1.13	25.69	3.88	18.47
Oman										
BANK MUSCAT	0.256	-0.78	-0.78	0.00	1.59	1.59	0.79	9.51	6.05	1.92
OMANTEL	0.883	-1.01	-1.89	-1.78	-6.06	-6.06	1.04	10.45	6.80	0.66
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	0.61	-1.49	0.00	0.00	0.00	0.70	7.50	6.06	0.22

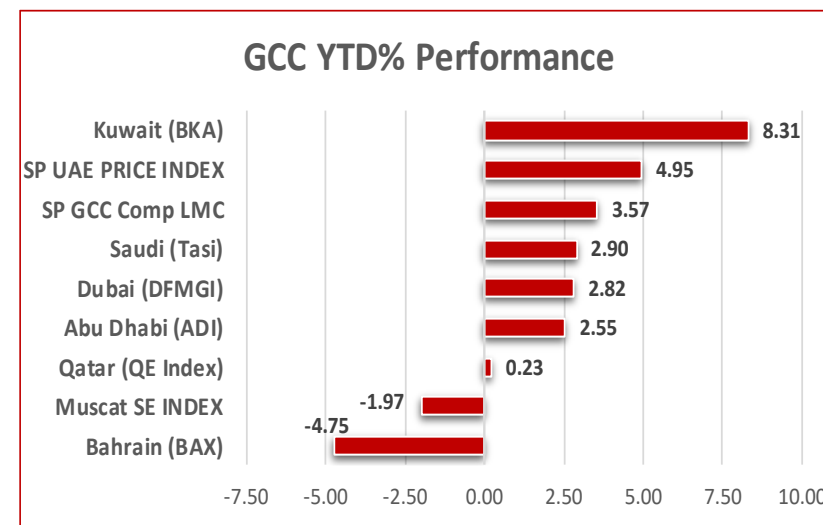
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
29-Jan. 25	24.78%	15.04%	0.06%	3.86%	9.31%	17.92%	13.29%	6.39%	6.42%
5-Feb. 25	24.96%	15.38%	0.06%	3.97%	9.24%	17.97%	13.31%	6.41%	6.46%

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 0.19%, the best performing sector today is health care at 4.05%.

KSA

Aramco had a positive performance today at 0.18%, Sabic had a negative performance at -1.77%, STC had a positive performance at 0.57%, Al Rajhi Bank had a positive performance at 0.10%.

UAE

ETISALAT.AD had a negative performance today at -0.24%, FAB.AD had a positive performance at 1.26%.



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