

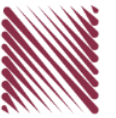


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 14th January 2025

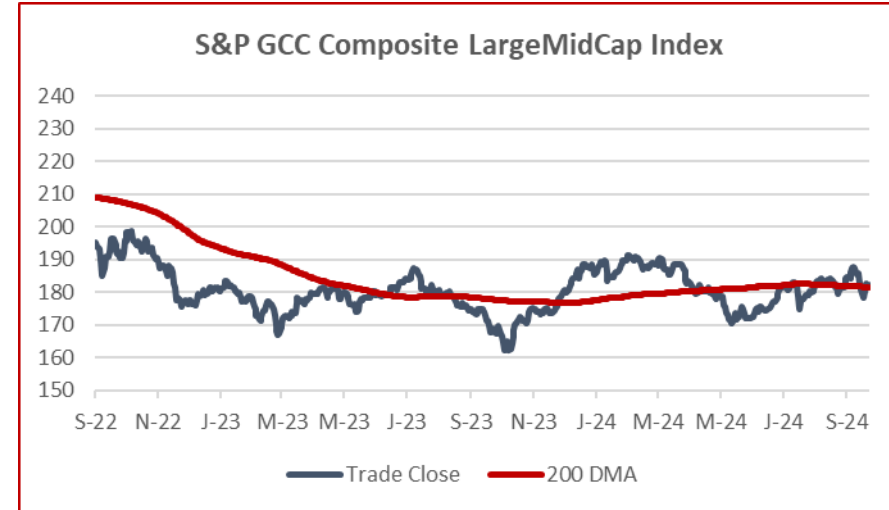




* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,109.9	-0.14	0.10	0.61	0.61	0.61	2.43	20.55	3.32	10,226.94
Qatar (QE Index)	10,219.7	-1.78	-2.12	-3.32	-3.32	-3.32	1.19	11.32	4.39	517.33
Dubai (DFMGI)	5,232.5	0.08	0.08	1.43	1.43	1.43	1.87	10.46	4.49	789.93
Abu Dhabi (ADI)	9,459.2	-0.38	-0.38	0.43	0.43	0.43	2.74	16.71	2.07	2,715.64
Bahrain (BAX)	1,919.5	-2.57	-2.74	-3.35	-3.35	-3.35	0.88	9.08	4.74	7.30
Muscat SE INDEX	4,597.5	-0.01	-0.01	0.46	0.46	0.46	0.84	9.77	5.87	7.38
SP GCC Comp LMC	189.2	0.00	-0.04	0.67	0.67	0.67	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	154.6	0.00	0.00	1.52	1.52	1.52				
Developed Markets										
MSCI World Index	3,674.9	-0.09	-0.09	-0.89	-0.89	-0.89				
U.S. (S&P 500)	5,836.2	0.16	0.16	-0.77	-0.77	-0.77	4.83	27.51	1.56	52,105.70
U.K. (FTSE 100)	8,224.2	-0.29	-0.29	0.63	0.63	0.63	1.65	15.71	3.72	2,127.43
Japan (topix)	2,714.1	-0.80	-2.54	-2.54	-2.54	-2.54	1.42	14.34	2.29	951,285.69
Emerging Markets										
MSCI EM Index	1,039.1	-1.70	-1.70	-3.38	-3.38	-3.38				
China (SSE Composite)	3,160.8	-0.25	-0.25	-5.70	-5.70	-5.70	1.36	12.00		44,025.04
India (Sensex)	76,330.0	-1.36	-1.36	-2.32	-2.32	-2.32	4.13	22.17	1.21	151,286.44

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,483.7	-0.11	-0.78	1.65	1.65	1.65	1.54	15.81	3.84	45.13
Kuwait Premier Index	7,953.7	-0.25	-0.88	1.47	1.47	1.47	1.64	16.66	3.75	36.45
Kuwait Main Index	7,074.0	0.48	-0.34	2.41	2.41	2.41	1.24	12.77	4.29	8.68
Kuwait Sector										
Banking	1,851.9	-0.29	-0.99	2.32	2.32	2.32	1.84	18.00	2.95	27.84
Telecom	1,012.3	0.16	-0.85	-0.53	-0.53	-0.53	1.48	12.54	8.32	3.09
Industrials	728.2	-0.10	-1.21	0.64	0.64	0.64	0.82	11.83	10.95	2.47
Financial Services	1,516.3	-0.02	-0.69	0.38	0.38	0.38	1.24	12.75	2.74	5.06
Real Estate	1,376.4	0.37	-0.01	1.72	1.72	1.72	1.05	15.51	2.07	2.91
Basic Materials	895.6	0.49	0.17	-1.72	-1.72	-1.72	1.60	11.53	9.83	0.50
Health Care	396.6	-6.94	-13.45	-13.45	-13.45	-13.45	1.43	13.74	2.46	
Consumer Staples	993.2	-2.42	-1.19	-0.55	-0.55	-0.55	2.21	20.74	2.02	0.31
Insurance	2,105.6	3.95	5.69	2.45	2.45	2.45	1.10	10.05	3.91	0.82
Consumer Discretionary	2,202.0	0.56	0.30	3.73	3.73	3.73				
Energy	1,195.6	0.09	0.02	0.54	0.54	0.54	1.02	9.34	5.32	0.24
Technology	1,076.7	0.00	-0.67	3.50	3.50	3.50	1.25			0.01
Utilities	392.1	-0.67	-0.67	-1.32	-1.32	-1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slipped at market open on Tuesday but remained near four-month highs as Chinese and Indian buyers sought new suppliers in the wake of the Biden administration's toughest sanctions yet on Russian oil. Brent futures slipped 22 cents, or 0.27%, to \$80.79 a barrel.

Kuwait Market

The market closed down by -0.11% at 7,483.7 value traded 76.2 million KD, Premier market value reached 52.9 million KD down by -0.25% at 7,953.7.

KSA Market

The market closed down by -0.14% at 12,109.9



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.907	-0.87	-1.95	1.23	1.23	1.23	1.71	13.38	3.73	7.55
KFH	0.751	-0.53	-0.79	0.67	0.67	0.67	2.16	20.47	2.55	12.84
ZAIN	0.459	0.22	-0.65	-2.13	-2.13	-2.13	1.73	11.10	7.63	1.98
BOUBYAN BANK	0.605	2.20	1.51	7.84	7.84	7.84	2.45	29.27	1.25	2.54
AGILITY	0.255	1.19	-0.78	3.24	3.24	3.24	0.67	10.64	7.84	0.68
Saudi Arabia										
ARAMCO	28.05	0.18	0.36	0.00	0.00	0.00	4.56	16.55	6.87	6,788.10
SABIC	67.00	0.45	0.75	0.00	0.00	0.00	1.21	81.35	5.07	201.00
STC	41.25	0.61	0.61	3.13	3.13	3.13	2.59	16.19	3.88	206.25
AL-RAJHI BANK	95.80	0.00	0.00	1.27	1.27	1.27	3.25	21.90	2.51	383.20
NCB	33.25	0.00	-0.89	-0.45	-0.45	-0.45	1.08	9.98	5.41	199.50
Abu Dhabi										
ETISALAT.AD	16.28	0.12	0.12	-0.25	-0.25	-0.25	3.28	12.79	5.01	141.58
FAB.AD	14.20	-2.07	-2.07	3.35	3.35	3.35	1.22	9.72	5.00	156.87
EMIRATES NBD	21.80	1.16	1.16	1.63	1.63	1.63	1.12	6.11	5.50	137.69
DB ISLAMIC DB	7.26	-0.27	-0.27	2.40	2.40	2.40	1.14	7.52	6.20	52.56
EMAR.DU	12.75	-1.92	-1.92	-0.78	-0.78	-0.78	1.40	9.46	3.92	112.69
Qatar										
QNB	16.450	-1.50	-2.55	-4.86	-4.86	-4.86	1.36	10.00	3.98	151.94
INDUSTREIS QAT	13.000	-1.14	-1.14	-2.03	-2.03	-2.03	2.13	14.72	5.38	78.65
QA ISLAMIC BK	20.000	-2.68	-3.38	-6.37	-6.37	-6.37	1.56	11.00	3.06	47.26
MASRAF AL RAYA	2.410	-0.82	-2.11	-2.15	-2.15	-2.15	0.90	15.39	4.15	22.41
MESAIEED PETRO	1.426	-2.73	-2.66	-4.62	-4.62	-4.62	1.10	22.38	4.91	17.92
Oman										
BANK MUSCAT	0.26	1.17	1.17	3.17	3.17	3.17	0.81	9.70	5.96	1.95
OMANTEL	0.918	-0.65	-0.65	-2.34	-2.34	-2.34	1.08	10.86	6.54	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	0.00	-1.01	-1.01	-1.01	0.68	9.99	2.90	0.48
OMINVEST	0.329	0.00	0.00	-0.30	-0.30	-0.30	0.70	7.47	6.08	0.22

* GCC Markets performance at the latest close.

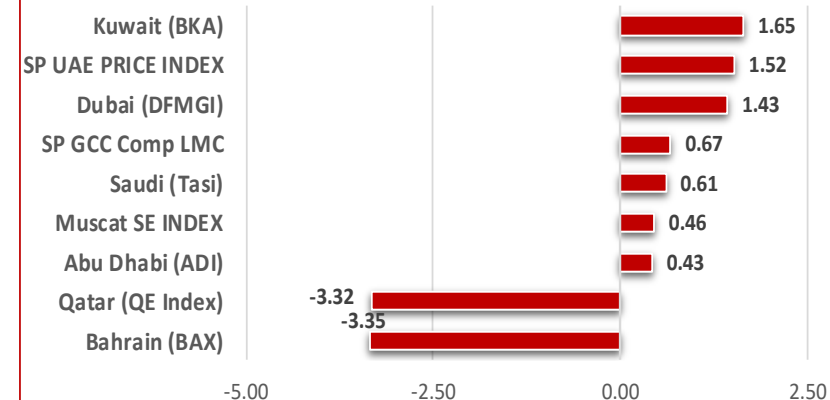
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
01-Jan. 25	24.72%	15.85%	0.06%	3.74%	8.58%	17.80%	13.28%	5.93%	6.09%
08-Jan. 25	24.73%	15.92%	0.06%	3.76%	8.72%	17.86%	13.27%	5.94%	6.10%

End of Report

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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 -0.11%, the worst performing sector today is Health care at -6.94%.

KSA

Saudi Armco had a positive performance today at 0.18%, SABIC had a positive performance at 0.45% , STC had a positive performance at 0.61%, Al Rajhi Bank had a flat performance today.

UAE

ETISALAT.AD had a positive performance today by 0.12%, FAB.AD had a negative performance today at -2.07%.



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