

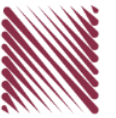


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 16th February 2025





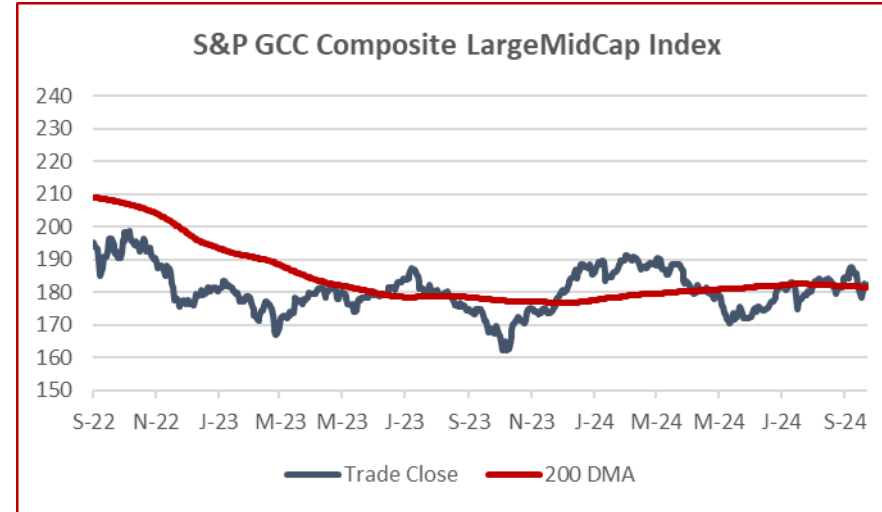
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,385.0	-0.01	-0.39	-0.25	2.90	2.90	2.25		3.43	10,261.91
Qatar (QE Index)	10,619.1	0.23	0.03	-0.45	0.45	0.45	1.20	11.48	4.62	534.46
Dubai (DFMGI)	5,362.0	0.80	2.36	3.51	3.94	3.94	1.80	10.69	5.18	804.80
Abu Dhabi (ADI)	9,625.7	-0.34	0.41	0.41	2.19	2.19	2.65	18.78	2.16	2,737.56
Bahrain (BAX)	1,891.6	0.00	0.53	0.64	-4.75	-4.75	0.86	8.60	5.07	7.19
Muscat SE INDEX	4,478.3	-0.18	-1.88	-1.43	-2.15	-2.15	0.79	9.34	6.03	7.19
SP GCC Comp LMC	194.1	-0.05	0.10	0.56	3.28	3.28	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	158.8	-0.31	1.13	1.87	4.29	4.29				

Developed Markets										
MSCI World Index	3,898.9	0.12	1.72	1.62	5.15	5.15				
U.S. (S&P 500)	6,114.6	-0.01	1.47	1.23	3.96	3.96	4.98	27.40	1.50	54,657.82
U.K. (FTSE 100)	8,732.5	-0.37	0.37	0.67	6.84	6.84	1.77	16.80	3.56	2,253.94
Japan (topix)	2,759.2	-0.23	0.80	-1.06	-0.92	-0.92	1.44	13.99	2.27	961,849.38

Emerging Markets										
MSCI EM Index	1,125.2	1.08	1.51	2.91	4.63	4.63				
China (SSE Composite)	3,346.7	0.43	1.30	2.96	-0.15	-0.15	1.36	12.00		44,025.04
India (Sensex)	75,939.2	-0.26	-2.47	-2.01	-2.82	-2.82	4.10	21.41	1.18	149,349.19

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,019.0	0.56	1.57	3.01	8.92	8.92	1.65	15.71	3.34	48.30
Kuwait Premier Index	8,568.6	0.64	1.73	3.23	9.31	9.31	1.78	16.65	3.20	39.51
Kuwait Main Index	7,404.3	0.22	0.83	2.03	7.20	7.20	1.22	12.20	4.03	8.79
Kuwait Sector										
Banking	2,001.0	0.59	1.78	3.04	10.56	10.56	1.98	17.19	2.77	29.98
Telecom	1,065.0	-0.18	0.74	5.12	4.65	4.65	1.58	12.50	7.89	3.25
Industrials	749.4	0.44	0.45	1.75	3.55	3.55	0.84	11.88	5.76	2.54
Financial Services	1,561.0	0.75	2.26	1.49	3.34	3.34	1.28	13.12	2.68	5.21
Real Estate	1,538.2	0.29	1.10	2.36	13.68	13.68	1.15	17.61	1.86	3.27
Basic Materials	919.8	0.53	-0.09	4.36	0.93	0.93	1.65	11.90	9.52	0.52
Health Care	418.2	0.07	-6.75	-9.80	-8.76	-8.76	1.40	13.48	2.51	
Consumer Staples	1,046.0	3.56	1.70	1.40	4.74	4.74	2.27	21.32	1.96	0.32
Insurance	2,088.5	-0.01	-0.69	2.29	1.62	1.62	1.14	10.36	3.80	0.84
Consumer Discretionary	2,481.2	1.50	2.49	8.66	16.88	16.88				
Energy	1,362.4	-0.04	1.08	2.56	14.57	14.57	1.13	10.35	4.66	0.28
Technology	1,171.3	11.03	16.67	11.81	12.59	12.59	1.36			0.02
Utilities	410.5	0.65	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 fell slightly on Friday on prospects for a peace deal between Russia and Ukraine that could ease global supply disruptions by ending sanctions against Moscow, but losses were limited by a delay in U.S. immediate reciprocal tariffs. Brent futures closed down 28 cents, or 0.37%, at \$74.74 a barrel.

Kuwait Market

The market closed up by 0.56% at 8,019.0 value traded 163.3 million KD, Premier market value reached 56.8 million KD, closed up by 0.64% at 8,568.6

KSA Market

The market closed down by -0.01% at 12,385.0.

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	1.007	0.30	2.55	4.46	12.39	12.39	1.84	14.50	3.48	8.38
KFH	0.800	0.50	0.76	1.78	7.24	7.24	2.24	17.25	2.40	13.69
ZAIN	0.484	0.00	1.26	6.61	3.20	3.20	1.82	11.71	7.23	2.09
BOUBYAN BANK	0.654	0.31	2.19	4.14	16.58	16.58	2.58	30.26	1.15	2.75
AGILITY	0.259	0.00	1.17	2.78	4.86	4.86	0.68	10.81	7.72	0.69
Saudi Arabia										
ARAMCO	27.80	0.00	0.54	0.00	-0.89	-0.89	4.52	16.40	6.93	6,727.60
SABIC	66.50	-0.15	-2.06	-0.75	-0.75	-0.75	1.21	80.74	5.11	199.50
STC	44.30	0.68	0.34	1.84	10.75	10.75	2.79	17.39	3.61	221.50
AL-RAJHI BANK	99.50	-0.10	-0.40	0.51	5.18	5.18	3.23	21.30	2.41	398.00
NCB	33.75	-0.44	-1.75	-1.32	1.05	1.05	1.04	9.82	5.63	202.50
Abu Dhabi										
ETISALAT.AD	16.84	0.12	-1.98	-1.40	3.31	3.31	3.40	13.24	4.83	146.63
FAB.AD	14.52	0.00	2.83	-0.14	5.68	5.68	1.23	9.83	5.17	160.32
EMIRATES NBD	21.30	-0.23	0.47	2.16	-0.70	-0.70	1.07	5.98	4.69	134.54
DB ISLAMIC DB	7.65	0.66	-0.65	-0.65	7.90	7.90	1.11	7.36	5.88	55.39
EMAR.DU	13.70	0.00	0.37	1.48	6.61	6.61	1.50	10.16	7.30	121.09
Qatar										
QNB	16.500	-0.48	-0.60	-1.20	-4.57	-4.57	1.35	9.79	4.24	152.40
INDUSTREIS QAT	13.260	0.45	-0.30	-3.42	-0.08	-0.08	2.13	17.87	5.58	80.22
QA ISLAMIC BK	21.090	0.91	1.25	2.38	-1.26	-1.26	1.60	11.36	3.79	49.83
MASRAF AL RAYA	2.390	0.55	0.50	0.08	-2.96	-2.96	0.89	15.21	4.18	22.23
MESAIEED PETRO	1.485	1.02	-0.47	-2.94	-0.67	-0.67	1.14	25.96	3.84	18.66
Oman										
BANK MUSCAT	0.256	0.00	-0.78	0.00	1.59	1.59	0.79	9.51	6.05	1.92
OMANTEL	0.883	0.00	-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	0.328	-0.61	-2.09	-0.61	-0.61	-0.61	0.69	7.45	6.10	0.22

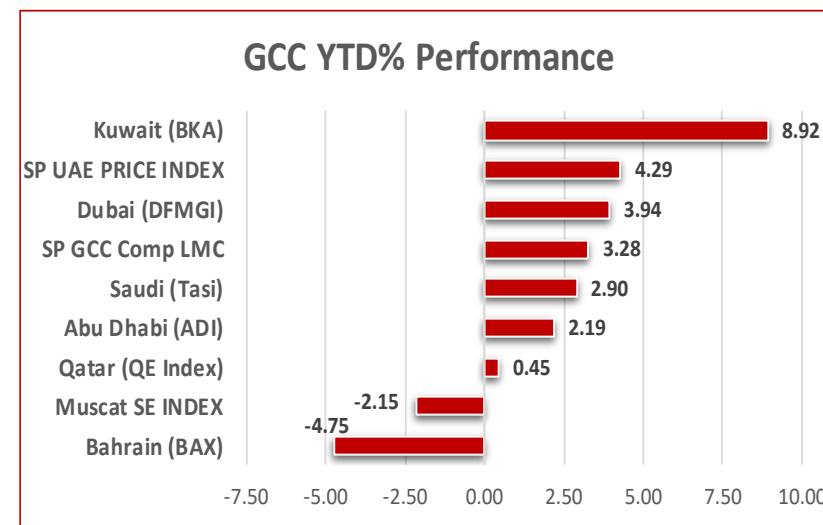
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
5-Feb. 25	24.96%	15.38%	0.06%	3.97%	9.24%	17.97%	13.31%	6.41%	6.46%
12-Feb. 25	25.11%	15.37%	0.06%	3.99%	9.17%	17.96%	13.38%	6.49%	6.54%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



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Kuwait

The market is up today by 0.56%, the best performing sector today is technology at 11.03%.

KSA

Aramco had a flat performance today, Sabic had a negative performance at -0.15%, STC had a positive performance at 0.68%, Al Rajhi Bank had a negative performance at -0.10%.

UAE

ETISALAT.AD had a positive performance today at 0.12%, FAB.AD had a flat performance.



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