

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

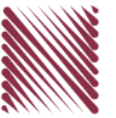
GCC DAILY MORNING BRIEF

Tuesday, 18th February 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

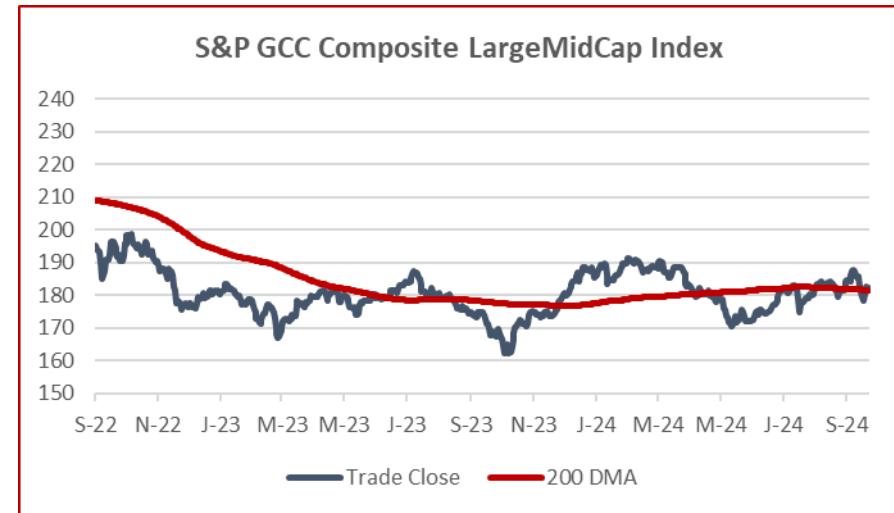


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,266.5	-0.85	-0.96	-1.20	1.91	1.91	2.22	18.94	3.46	10,190.35
Qatar (QE Index)	10,610.4	0.05	-0.08	-0.53	0.37	0.37	1.20	11.46	4.62	533.47
Dubai (DFMGI)	5,382.9	0.39	0.39	3.91	4.35	4.35	1.76	10.42	5.15	806.83
Abu Dhabi (ADI)	9,556.9	-0.72	-0.72	-0.31	1.46	1.46	2.63	18.62	2.18	2,726.67
Bahrain (BAX)	1,894.7	0.04	0.16	0.81	-4.59	-4.59	0.87	8.71	5.07	7.20
Muscat SE INDEX	4,465.5	-0.30	-0.29	-1.71	-2.43	-2.43	0.79	9.31	6.18	7.17
SP GCC Comp LMC	194.0	0.00	-0.03	0.53	3.25	3.25	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	158.8	0.00	0.00	1.87	4.29	4.29				

Developed Markets										
MSCI World Index	3,902.1	0.08	0.08	1.71	5.24	5.24				
U.S. (S&P 500)	6,114.6	0.00	0.00	1.23	3.96	3.96	4.98	27.40	1.50	54,647.82
U.K. (FTSE 100)	8,768.0	0.41	0.41	1.08	7.28	7.28	1.78	16.87	3.54	2,262.69
Japan (topix)	2,766.9	0.28	0.28	-0.78	-0.65	-0.65	1.44	14.04	2.26	963,474.99
Emerging Markets										
MSCI EM Index	1,130.6	0.48	0.48	3.41	5.13	5.13				
China (SSE Composite)	3,355.8	0.27	0.27	3.24	0.12	0.12	1.36	12.00		44,025.04
India (Sensex)	75,996.9	0.08	0.08	-1.94	-2.74	-2.74	4.11	21.42	1.18	149,511.93

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,020.2	-0.10	0.01	3.03	8.93	8.93	1.65	15.71	3.34	48.35
Kuwait Premier Index	8,567.0	-0.01	-0.02	3.21	9.29	9.29	1.78	16.65	3.20	39.50
Kuwait Main Index	7,416.5	-0.49	0.17	2.20	7.37	7.37	1.22	12.20	4.00	8.85
Kuwait Sector										
Banking	2,004.8	0.05	0.19	3.24	10.77	10.77	1.98	17.22	2.77	30.02
Telecom	1,058.4	-0.21	-0.63	4.46	3.99	3.99	1.58	12.45	7.93	3.24
Industrials	748.3	-0.27	-0.14	1.61	3.41	3.41	0.84	11.88	5.75	2.54
Financial Services	1,543.6	-0.42	-1.11	0.36	2.19	2.19	1.26	12.94	2.70	5.17
Real Estate	1,533.9	-0.29	-0.28	2.07	13.36	13.36	1.15	17.59	1.86	3.27
Basic Materials	917.6	0.10	-0.23	4.11	0.70	0.70	1.65	11.86	9.56	0.52
Health Care	453.3	2.04	8.41	-2.22	-1.09	-1.09	1.49	14.32	2.36	
Consumer Staples	1,012.1	-3.43	-3.24	-1.89	1.34	1.34	2.27	21.36	1.96	0.32
Insurance	2,135.4	-0.63	2.24	4.58	3.90	3.90	1.15	10.46	3.69	0.87
Consumer Discretionary	2,504.1	-0.21	0.92	9.66	17.96	17.96				
Energy	1,372.6	0.53	0.75	3.32	15.43	15.43	1.13	10.31	4.65	0.28
Technology	1,258.6	-4.95	7.45	20.14	20.98	20.98	1.54			0.02
Utilities	405.3	-0.64	-1.28	1.32	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Brent crude oil prices paused in early trading on Tuesday after gaining in the previous session following a drone attack on an oil pipeline pumping station in Russia that reduced flows from Kazakhstan. Brent crude futures ticked down 7 cents, or 0.09%, to \$75.15 a barrel by 0137 GMT.

Kuwait Market

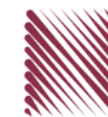
The market closed down by -0.10% at 8,020.2 value traded 200.7 million KD, Premier market value reached 57.0 million KD, closed down by -0.01% at 8,567.0

KSA Market

The market closed down by -0.85% at 12,266.5.

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	1.001	-0.60	-0.60	3.84	11.72	11.72	1.83	14.42	3.50	8.33
KFH	0.801	0.12	0.12	1.91	7.37	7.37	2.25	17.27	2.39	13.69
ZAIN	0.484	0.21	0.00	6.61	3.20	3.20	1.82	11.71	7.23	2.09
BOUBYAN BANK	0.659	0.46	0.76	4.94	17.47	17.47	2.60	30.50	1.15	2.77
AGILITY	0.259	-0.77	0.00	2.78	4.86	4.86	0.68	10.81	7.72	0.69
Saudi Arabia										
ARAMCO	27.65	-0.54	-0.54	-0.54	-1.43	-1.43	4.49	16.31	6.97	6,691.12
SABIC	66.20	-0.45	-0.45	-1.19	-1.19	-1.19	1.20	80.38	5.14	198.59
STC	43.35	-1.48	-2.14	-0.34	8.38	8.38	2.73	17.02	3.69	216.74
AL-RAJHI BANK	99.00	-1.00	-0.50	0.00	4.65	4.65	3.22	21.19	2.42	395.99
NCB	33.40	-0.89	-1.04	-2.34	0.00	0.00	1.03	9.72	5.69	200.39
Abu Dhabi										
ETISALAT.AD	16.40	-2.73	-2.73	-4.09	0.49	0.49	3.30	12.88	4.97	142.62
FAB.AD	14.12	-2.75	-2.75	-2.89	2.77	2.77	1.19	9.56	5.31	155.90
EMIRATES NBD	21.00	-1.41	-1.41	0.72	-2.10	-2.10	1.05	5.90	4.76	132.64
DB ISLAMIC DB	7.69	0.52	0.52	-0.13	8.46	8.46	1.12	7.40	5.85	55.68
EMAR.DU	14.05	2.55	2.55	4.07	9.34	9.34	1.45	9.19	7.12	124.18
Qatar										
QNB	16.430	-0.60	-0.42	-1.62	-4.97	-4.97	1.34	9.74	4.26	151.72
INDUSTREIS QAT	13.270	0.15	0.08	-3.35	0.00	0.00	2.13	17.88	5.58	80.27
QA ISLAMIC BK	21.210	1.00	0.57	2.96	-0.70	-0.70	1.61	11.42	3.77	50.11
MASRAF AL RAYA	2.395	0.21	0.21	0.29	-2.76	-2.76	0.89	15.25	4.18	22.27
MESAIEED PETRO	1.472	-0.54	-0.88	-3.79	-1.54	-1.54	1.13	25.73	3.87	18.49
Oman										
BANK MUSCAT	0.254	0.00	-0.78	-0.78	0.79	0.79	0.78	9.44	6.10	1.91
OMANTEL	0.878	0.00	-0.57	-2.34	-6.60	-6.60	1.04	10.39	6.83	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	0.324	-0.61	-1.22	-1.82	-1.82	-1.82	0.69	7.36	6.17	0.22

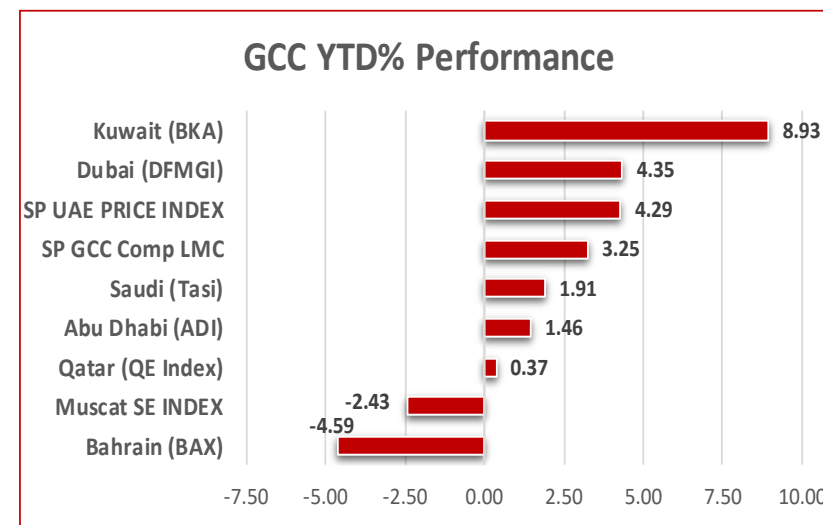
* GCC Markets performance at the latest close.

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



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.10%, the worst performing sector today is technology at -4.95%.

KSA

Aramco had a negative performance today at -0.54%, Sabic had a negative performance at -0.45%, STC had a negative performance at -1.48%, Al Rajhi Bank had a negative performance at -1.00%.

UAE

ETISALAT.AD had a negative performance today at -2.73%, FAB.AD had a negative performance at -2.75%.



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