



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 20th January 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

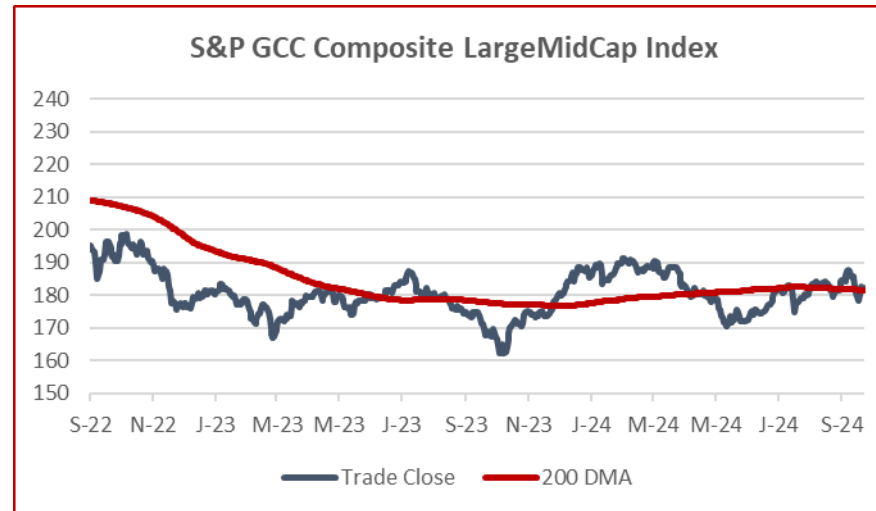


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,331.9	0.62	0.62	2.45	2.45	2.45	2.47	20.95	3.26	10,335.63
Qatar (QE Index)	10,468.0	-0.04	-0.04	-0.98	-0.98	-0.98	1.21	11.50	4.31	528.76
Dubai (DFMGI)	5,211.7	-0.46	-0.32	1.03	1.03	1.03	1.86	10.40	4.52	784.43
Abu Dhabi (ADI)	9,499.0	-0.08	0.04	0.85	0.85	0.85	2.75	16.79	2.06	2,727.56
Bahrain (BAX)	1,907.8	0.40	0.40	-3.93	-3.93	-3.93	0.87	9.01	4.78	7.26
Muscat SE INDEX	4,615.4	-0.14	-0.14	0.85	0.85	0.85	0.85	9.80	5.85	7.41
SP GCC Comp LMC	191.4	0.28	0.28	1.88	1.88	1.88	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	154.5	0.00	0.00	1.51	1.51	1.51				

Developed Markets										
MSCI World Index	3,777.9	0.83	2.71	1.89	1.89	1.89				
U.S. (S&P 500)	5,996.7	1.00	2.91	1.96	1.96	1.96	4.97	27.80	1.52	53,575.59
U.K. (FTSE 100)	8,505.2	1.35	3.11	4.06	4.06	4.06	1.71	16.26	3.60	2,199.00
Japan (topix)	2,679.4	-0.33	-1.28	-3.79	-3.79	-3.79	1.40	14.16	2.32	938,494.08
Emerging Markets										
MSCI EM Index	1,070.1	0.32	1.23	-0.50	-0.50	-0.50				
China (SSE Composite)	3,241.8	0.18	2.31	-3.28	-3.28	-3.28	1.36	12.00		44,025.04
India (Sensex)	76,619.3	-0.55	-0.98	-1.94	-1.94	-1.94	4.14	22.14	1.21	151,338.50

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,540.8	0.18	0.18	2.42	2.42	2.42	1.55	15.89	3.83	45.35
Kuwait Premier Index	8,010.0	0.00	0.00	2.18	2.18	2.18	1.65	16.74	3.73	36.62
Kuwait Main Index	7,144.9	0.92	0.92	3.44	3.44	3.44	1.25	12.82	4.28	8.73
Kuwait Sector										
Banking	1,867.7	-0.11	-0.11	3.20	3.20	3.20	1.86	18.11	2.93	28.02
Telecom	1,006.3	0.06	0.06	-1.12	-1.12	-1.12	1.47	12.48	8.36	3.07
Industrials	723.2	0.08	0.08	-0.07	-0.07	-0.07	0.81	11.72	11.05	2.45
Financial Services	1,511.2	0.04	0.04	0.04	0.04	0.04	1.24	12.67	2.76	5.04
Real Estate	1,419.9	1.18	1.18	4.93	4.93	4.93	1.08	15.87	2.03	2.98
Basic Materials	907.6	1.38	1.38	-0.40	-0.40	-0.40	1.61	11.59	9.78	0.51
Health Care	469.8	2.60	2.60	2.50	2.50	2.50	1.53	14.76	2.29	
Consumer Staples	1,015.1	1.37	1.37	1.65	1.65	1.65	2.17	20.41	2.05	0.30
Insurance	2,060.0	3.24	3.24	0.23	0.23	0.23	1.09	9.89	3.97	0.81
Consumer Discretionary	2,234.4	1.10	1.10	5.26	5.26	5.26				
Energy	1,252.5	3.24	3.24	5.33	5.33	5.33	1.04	9.52	5.23	0.25
Technology	1,062.2	2.10	2.10	2.10	2.10	2.10	1.21			0.01
Utilities	402.6	0.66	0.66	1.32	1.32	1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell slightly on Friday but posted a fourth consecutive week of gains, as the latest U.S. sanctions on Russian energy trade heightened expectations for oil supply disruptions. Brent crude futures lost 50 cents to close at \$80.79 per barrel. U.S. West Texas Intermediate crude futures dropped 80 cents to settle at \$77.88 a barrel. Oil prices gained more than 1% for the week.

Kuwait Market

The market closed up by 0.18% at 7,540.8 value traded 57.8 million KD, Premier market value reached 34.4 million KD flat at 8,010.0

KSA Market

The market closed up by 0.62% at 12,331.9



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.927	-0.32	-0.32	3.46	3.46	3.46	1.75	13.67	3.65	7.72
KFH	0.759	0.26	0.26	1.74	1.74	1.74	2.18	20.69	2.53	12.99
ZAIN	0.455	0.00	0.00	-2.99	-2.99	-2.99	1.72	11.01	7.69	1.97
BOUBYAN BANK	0.599	-0.83	-0.83	6.77	6.77	6.77	2.42	28.98	1.26	2.52
AGILITY	0.247	-0.40	-0.40	0.00	0.00	0.00	0.65	10.31	8.10	0.66
Saudi Arabia										
ARAMCO	28.15	-0.35	-0.35	0.36	0.36	0.36	4.57	16.61	6.84	6,813.03
SABIC	68.40	1.18	1.18	2.09	2.09	2.09	1.24	83.05	4.97	205.22
STC	42.45	1.07	1.07	6.13	6.13	6.13	2.67	16.67	3.77	212.27
AL-RAJHI BANK	96.00	-0.72	-0.72	1.48	1.48	1.48	3.26	21.94	2.50	384.04
NCB	35.35	1.29	1.29	5.84	5.84	5.84	1.15	10.61	5.09	212.12
Abu Dhabi										
ETISALAT.AD	16.36	0.49	0.62	0.25	0.25	0.25	3.29	12.85	4.98	142.28
FAB.AD	14.30	-0.69	-1.38	4.08	4.08	4.08	1.22	9.79	4.97	157.98
EMIRATES NBD	22.25	0.68	3.25	3.73	3.73	3.73	1.14	6.24	5.39	140.54
DB ISLAMIC DB	7.31	0.14	0.41	3.10	3.10	3.10	1.15	7.57	6.16	52.93
EMAR.DU	12.80	-0.39	-1.54	-0.39	-0.39	-0.39	1.41	9.49	3.91	113.14
Qatar										
QNB	16.650	-0.89	-0.89	-3.70	-3.70	-3.70	1.36	9.87	3.93	154.19
INDUSTREIS QAT	13.150	-0.23	-0.23	-0.90	-0.90	-0.90	2.16	14.89	5.32	79.77
QA ISLAMIC BK	20.560	-0.87	-0.87	-3.75	-3.75	-3.75	1.60	11.31	2.98	48.71
MASRAF AL RAYA	2.425	0.41	0.41	-1.54	-1.54	-1.54	0.90	15.49	4.12	22.61
MESAEED PETRO	1.474	0.27	0.27	-1.40	-1.40	-1.40	1.14	23.13	4.75	18.57
Oman										
BANK MUSCAT	0.26	0.00	0.00	3.17	3.17	3.17	0.81	9.70	5.96	1.95
OMANTEL	0.912	0.00	0.00	-2.98	-2.98	-2.98	1.08	10.79	6.58	0.68
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	0.328	0.61	0.61	-0.61	-0.61	-0.61	0.69	7.45	6.10	0.22

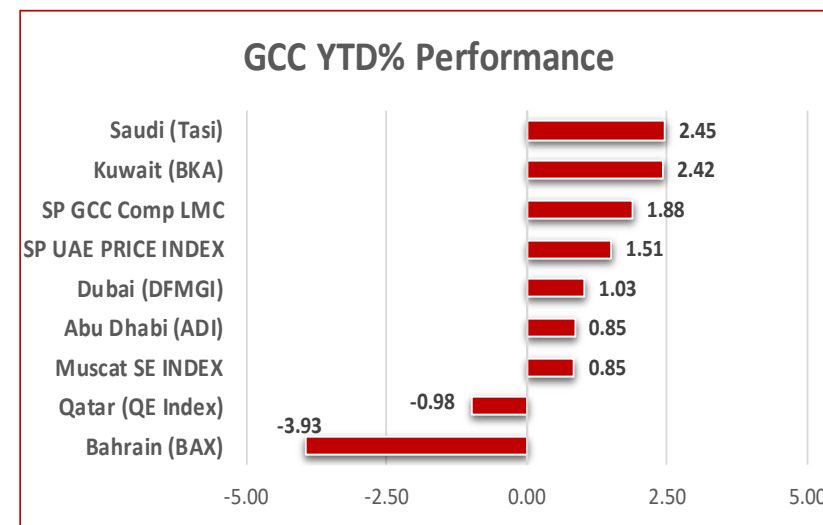
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
08-Jan. 25	24.73%	15.92%	0.06%	3.76%	8.72%	17.86%	13.27%	5.94%	6.10%
15-Jan. 25	24.75%	15.80%	0.06%	3.78%	8.81%	17.86%	13.27%	6.16%	6.32%

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 0.18%, the best performing sector today is insurance at 3.24%.

KSA

Saudi Armco had a negative performance at -0.35%, SABIC had a positive performance at 1.18% , STC had a positive performance at 1.07%, Al Rajhi Bank had a negative performance today at -0.72% .

UAE

ETISALAT.AD had a positive performance today at 0.49%, FAB.AD had a negative performance today at -0.69%.



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