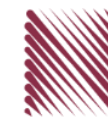


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 23rd February 2025



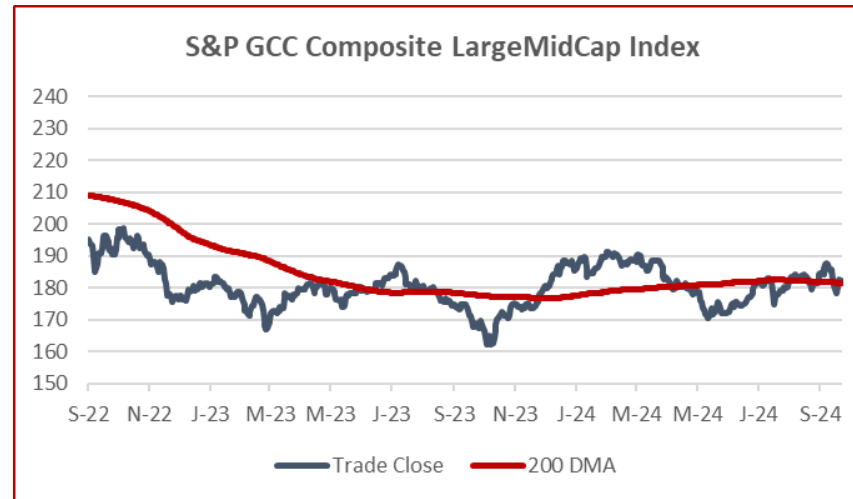


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,388.2	0.57	0.03	-0.22	2.92	2.92	2.24	19.12	3.43	10,239.36
Qatar (QE Index)	10,654.4	0.08	0.33	-0.12	0.79	0.79	1.20	11.53	4.60	537.03
Dubai (DFMGI)	5,359.3	-0.39	-0.05	3.45	3.89	3.89	1.75	10.38	5.19	799.44
Abu Dhabi (ADI)	9,618.3	-0.01	-0.08	0.34	2.12	2.12	2.63	18.70	2.16	2,736.30
Bahrain (BAX)	1,940.1	0.41	2.56	3.22	-2.31	-2.31	0.88	8.80	5.16	7.38
Muscat SE INDEX	4,443.9	-0.20	-0.77	-2.19	-2.90	-2.90	0.78	9.26	6.16	7.14
SP GCC Comp LMC	195.3	-0.06	0.58	1.15	3.89	3.89	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	158.7	-0.16	-0.21	1.65	4.06	4.06				

Developed Markets										
MSCI World Index	3,843.1	-1.30	-1.43	0.17	3.65	3.65				
U.S. (S&P 500)	6,013.1	-1.71	-1.66	-0.45	2.24	2.24	4.82	26.90	1.53	53,670.66
U.K. (FTSE 100)	8,659.4	-0.04	-0.84	-0.17	5.95	5.95	1.76	16.46	3.62	2,234.72
Japan (topix)	2,736.5	0.07	-0.82	-1.87	-1.74	-1.74	1.42	13.86	2.29	953,179.42
Emerging Markets										
MSCI EM Index	1,147.3	1.31	1.96	4.93	6.68	6.68				
China (SSE Composite)	3,379.1	0.85	0.97	3.95	0.82	0.82	1.36	12.00		44,025.04
India (Sensex)	75,311.1	-0.56	-0.83	-2.83	-3.62	-3.62	4.07	21.23	1.19	147,937.14

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,142.9	0.49	1.55	4.60	10.60	10.60	1.66	15.91	3.42	49.04
Kuwait Premier Index	8,711.4	0.56	1.67	4.95	11.13	11.13	1.80	16.89	3.30	40.16
Kuwait Main Index	7,477.6	0.16	0.99	3.04	8.26	8.26	1.22	12.28	3.99	8.88
Kuwait Sector										
Banking	2,037.5	0.79	1.82	4.92	12.58	12.58	2.00	17.49	2.92	30.52
Telecom	1,081.0	0.53	1.50	6.69	6.21	6.21	1.61	12.69	7.78	3.30
Industrials	763.6	0.83	1.91	3.69	5.53	5.53	0.86	12.09	5.65	2.59
Financial Services	1,570.7	-0.07	0.62	2.12	3.98	3.98	1.27	13.10	2.66	5.24
Real Estate	1,542.8	0.13	0.30	2.67	14.02	14.02	1.16	17.59	1.86	3.29
Basic Materials	930.3	0.98	1.15	5.56	2.09	2.09	1.67	11.46	9.42	0.52
Health Care	519.3	3.94	24.19	12.01	13.31	13.31	1.74	17.55	2.02	
Consumer Staples	1,049.4	-13.15	0.33	1.73	5.08	5.08	2.28	21.39	1.96	0.32
Insurance	2,088.1	-0.61	-0.02	2.27	1.60	1.60	1.12	10.19	3.80	0.84
Consumer Discretionary	2,484.0	-0.16	0.12	8.79	17.02	17.02				
Energy	1,373.8	-0.13	0.84	3.42	15.53	15.53	1.14	10.38	4.62	0.28
Technology	1,433.2	4.79	22.36	36.81	37.76	37.76	1.66			0.02
Utilities	402.6	0.66	-1.92	0.66	1.32	1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices settled down more than \$2 a barrel on Friday, posting a weekly decline as investors grappled with a fading Middle East risk premium alongside uncertainty about a potential peace deal in Ukraine. Brent futures settled down \$2.05, or 2.68%, to \$74.43 a barrel, while U.S. West Texas Intermediate crude settled down \$2.08, or 2.87%, to \$70.40.

Kuwait Market

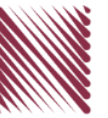
The market closed up by 0.49% at 8,142.9 value traded 157.2 million KD, Premier market value reached 53.9 million KD, closed up by 0.56% at 8,711.4

KSA Market

The market closed up by 0.57% at 12,388.2.

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	1.034	1.67	2.68	7.26	15.40	15.40	1.89	14.89	3.38	8.61
KFH	0.809	0.37	1.13	2.93	8.45	8.45	2.27	17.44	2.72	13.84
ZAIN	0.497	0.20	2.69	9.47	5.97	5.97	1.87	12.02	7.04	2.15
BOUBYAN BANK	0.669	0.15	2.29	6.53	19.25	19.25	2.64	30.96	1.49	2.81
AGILITY	0.275	2.23	6.18	9.13	11.34	11.34	0.72	11.48	7.27	0.74
Saudi Arabia										
ARAMCO	27.70	0.18	-0.36	-0.36	-1.25	-1.25	4.50	16.34	6.95	6,703.40
SABIC	65.60	-0.15	-1.35	-2.09	-2.09	-2.09	1.19	79.65	5.18	196.80
STC	44.80	1.24	1.13	2.99	12.00	12.00	2.82	17.59	3.57	224.00
AL-RAJHI BANK	100.20	0.00	0.70	1.21	5.92	5.92	3.26	21.45	2.40	400.80
NCB	35.75	2.14	5.93	4.53	7.04	7.04	1.10	10.40	5.31	214.50
Abu Dhabi										
ETISALAT.AD	16.52	0.48	-1.54	-2.92	1.72	1.72	3.34	13.04	4.91	144.37
FAB.AD	14.48	-1.24	-1.52	-1.65	4.08	4.08	1.21	9.68	5.24	157.89
EMIRATES NBD	20.90	-1.18	-1.88	0.24	-2.56	-2.56	1.05	5.87	4.78	132.02
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	14.15	-0.70	3.28	4.81	10.12	10.12	1.46	9.25	7.07	125.07
Qatar										
QNB	16.750	0.36	1.52	0.30	-3.12	-3.12	1.37	9.93	4.18	154.71
INDUSTREIS QAT	13.390	0.30	0.98	-2.48	0.90	0.90	2.15	18.04	5.53	81.01
QA ISLAMIC BK	21.440	0.61	1.66	4.08	0.37	0.37	1.63	11.55	3.73	50.66
MASRAF AL RAYA	2.399	0.38	0.38	0.46	-2.60	-2.60	0.89	15.27	4.17	22.31
MESAIEED PETRO	1.477	-0.07	-0.54	-3.46	-1.20	-1.20	1.13	25.82	3.86	18.56
Oman										
BANK MUSCAT	0.255	0.00	-0.39	-0.39	1.19	1.19	0.78	9.48	6.08	1.91
OMANTEL	0.860	-0.69	-2.60	-4.34	-8.51	-8.51	1.02	10.18	6.98	0.65
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	0.322	-0.31	-1.83	-2.42	-2.42	-2.42	0.68	7.31	6.21	0.22

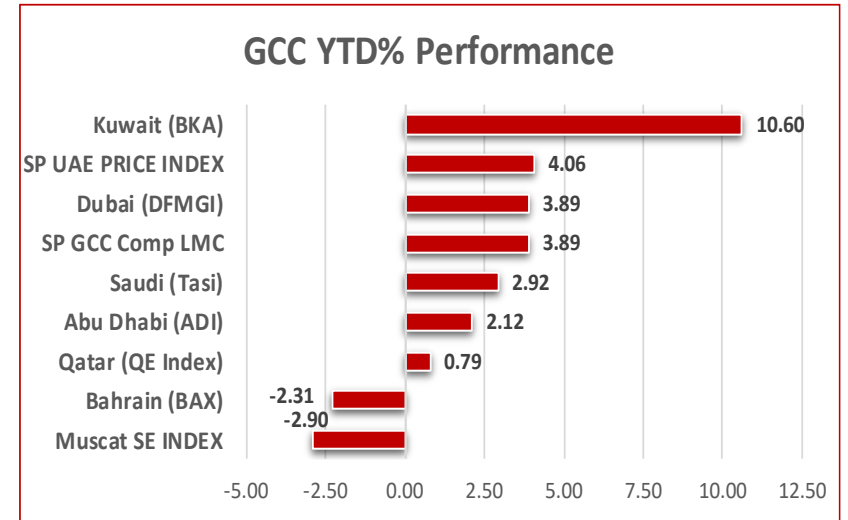
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
12-Feb. 25	25.11%	15.37%	0.06%	3.99%	9.17%	17.96%	13.38%	6.49%	6.54%
19-Feb. 25	25.23%	15.60%	0.06%	4.05%	9.25%	17.96%	13.46%	6.60%	6.78%

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 0.49%, the best performing sector today is technology at 4.79%.

KSA

Aramco had a positive performance today at 0.18%, Sabic had a negative performance at -0.15%, STC had a positive performance at 1.24%, Al Rajhi Bank had a flat performance.

UAE

ETISALAT.AD had a positive performance today at 0.48%, FAB.AD had a negative performance at -1.24%.



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