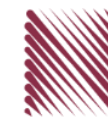


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 23rd January 2025



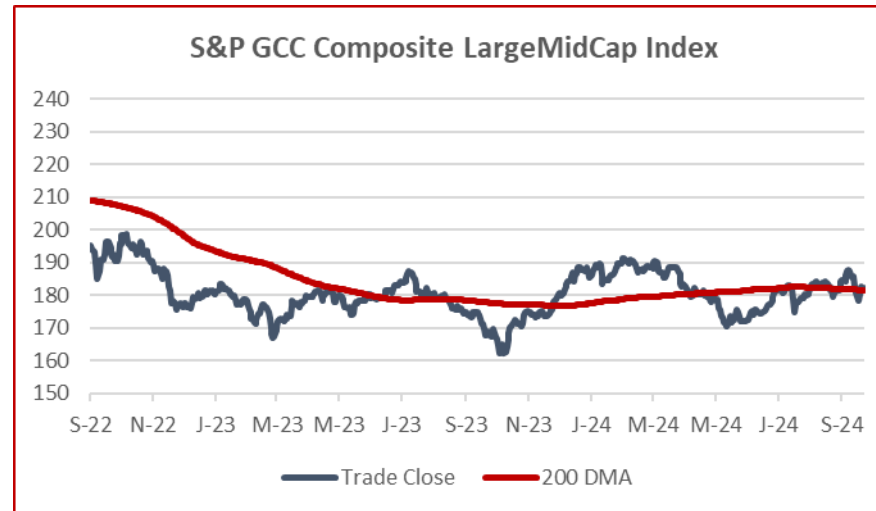


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,362.4	-0.06	0.87	2.71	2.71	2.71	2.48	21.02	3.25	10,301.93
Qatar (QE Index)	10,619.4	1.07	1.41	0.46	0.46	0.46	1.21	11.59	4.26	534.79
Dubai (DFMGI)	5,230.8	0.20	0.37	1.40	1.40	1.40	1.87	10.46	4.49	787.33
Abu Dhabi (ADI)	9,534.1	0.18	0.37	1.22	1.22	1.22	2.76	16.84	2.05	2,735.17
Bahrain (BAX)	1,898.6	-0.29	-0.08	-4.39	-4.39	-4.39	0.87	8.96	4.80	7.23
Muscat SE INDEX	4,618.7	0.13	-0.06	0.92	0.92	0.92	0.85	9.81	5.83	7.42
SP GCC Comp LMC	192.1	0.00	0.63	2.24	2.24	2.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.1	0.00	0.33	1.84	1.84	1.84				

Developed Markets										
MSCI World Index	3,838.2	0.55	1.60	3.52	3.52	3.52				
U.S. (S&P 500)	6,086.4	0.61	1.50	3.48	3.48	3.48	5.00	28.00	1.51	54,043.51
U.K. (FTSE 100)	8,545.1	-0.04	0.47	4.55	4.55	4.55	1.72	16.34	3.59	2,208.10
Japan (topix)	2,737.2	0.87	2.16	-1.71	-1.71	-1.71	1.43	14.46	2.28	958,364.25
Emerging Markets										
MSCI EM Index	1,082.3	0.11	1.14	0.64	0.64	0.64				
China (SSE Composite)	3,213.6	-0.89	-0.87	-4.12	-4.12	-4.12	1.36	12.00		44,025.04
India (Sensex)	76,405.0	0.75	-0.28	-2.22	-2.22	-2.22	4.12	22.06	1.21	150,953.60

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,691.0	0.90	2.17	4.46	4.46	4.46	1.57	16.09	3.78	45.92
Kuwait Premier Index	8,178.1	0.86	2.10	4.33	4.33	4.33	1.67	16.94	3.69	37.07
Kuwait Main Index	7,254.8	1.04	2.47	5.03	5.03	5.03	1.27	13.02	4.23	8.85
Kuwait Sector										
Banking	1,915.3	1.17	2.44	5.83	5.83	5.83	1.88	18.34	2.90	28.37
Telecom	1,018.6	0.33	1.28	0.09	0.09	0.09	1.49	12.59	8.28	3.10
Industrials	725.2	0.59	0.37	0.22	0.22	0.22	0.81	11.69	11.08	2.44
Financial Services	1,523.1	0.60	0.83	0.83	0.83	0.83	1.24	12.71	2.76	5.06
Real Estate	1,451.6	0.12	3.45	7.28	7.28	7.28	1.11	16.45	1.96	3.08
Basic Materials	896.9	-0.56	0.18	-1.58	-1.58	-1.58	1.62	11.67	9.71	0.51
Health Care	469.8	0.00	2.60	2.50	2.50	2.50	1.57	15.14	2.23	
Consumer Staples	1,049.8	2.44	4.83	5.11	5.11	5.11	2.22	20.88	2.01	0.31
Insurance	2,054.5	0.44	2.97	-0.04	-0.04	-0.04	1.11	10.14	3.88	0.83
Consumer Discretionary	2,259.5	-0.24	2.24	6.44	6.44	6.44				
Energy	1,350.1	7.31	11.29	13.53	13.53	13.53	1.08	9.88	5.05	0.26
Technology	1,062.2	-5.19	2.10	2.10	2.10	2.10	1.30			0.02
Utilities	405.3	-0.64	1.32	1.99	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

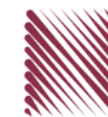
Oil prices fell Wednesday as the market considers how U.S. President Donald Trump's proposed tariffs could affect global economic growth and demand for energy. Brent futures fell 29 cents, or 0.37%, to close at \$79 a barrel, while U.S. West Texas Intermediate crude (WTI) lost 39 cents, or 0.51%, lower at \$75.44.

Kuwait Market

The market closed up by 0.90% at 7,691.0 value traded 104.1 million KD, Premier market value reached 67.7 million KD, closed up by 0.86% at 8,178.1

KSA Market

The market closed down by -0.06% at 12,362.4



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.946	1.28	1.72	5.58	5.58	5.58	1.78	13.95	3.57	7.88
KFH	0.778	0.78	2.77	4.29	4.29	4.29	2.24	21.21	2.46	13.31
ZAIN	0.462	0.22	1.54	-1.49	-1.49	-1.49	1.74	11.18	7.58	2.00
BOUBYAN BANK	0.620	1.47	2.65	10.52	10.52	10.52	2.51	30.00	1.22	2.60
AGILITY	0.248	1.22	0.00	0.40	0.40	0.40	0.65	10.35	8.06	0.66
Saudi Arabia										
ARAMCO	28.00	0.00	-0.88	-0.18	-0.18	-0.18	4.55	16.52	6.88	6,774.92
SABIC	66.80	-1.91	-1.18	-0.30	-0.30	-0.30	1.21	81.11	5.09	200.37
STC	41.90	-0.71	-0.24	4.75	4.75	4.75	2.64	16.45	3.82	209.47
AL-RAJHI BANK	97.10	0.62	0.41	2.64	2.64	2.64	3.30	22.19	2.47	388.34
NCB	34.90	-0.43	0.00	4.49	4.49	4.49	1.13	10.48	5.16	209.37
Abu Dhabi										
ETISALAT.AD	16.86	1.20	3.06	3.31	3.31	3.31	3.40	13.24	4.83	146.63
FAB.AD	14.12	-0.56	-1.26	2.77	2.77	2.77	1.21	9.66	5.03	155.99
EMIRATES NBD	22.20	1.37	-0.22	3.50	3.50	3.50	1.14	6.23	5.41	140.23
DB ISLAMIC DB	7.44	1.36	1.78	4.94	4.94	4.94	1.17	7.71	6.05	53.87
EMAR.DU	13.30	0.76	3.91	3.50	3.50	3.50	1.46	9.87	3.76	117.56
Qatar										
QNB	16.500	0.00	-1.79	-4.57	-4.57	-4.57	1.35	9.79	3.97	152.80
INDUSTREIS QAT	13.600	0.82	3.19	2.49	2.49	2.49	2.23	15.40	5.15	82.49
QA ISLAMIC BK	20.500	1.08	-1.16	-4.03	-4.03	-4.03	1.55	11.04	2.99	48.57
MASRAF AL RAYA	2.495	1.01	3.31	1.30	1.30	1.30	0.93	15.93	4.01	23.26
MESAIEED PETRO	1.504	2.59	2.31	0.60	0.60	0.60	1.16	23.60	4.65	18.94
Oman										
BANK MUSCAT	0.261	0.00	0.38	3.57	3.57	3.57	0.81	9.74	5.94	1.96
OMANTEL	0.916	0.44	0.44	-2.55	-2.55	-2.55	1.08	10.84	6.55	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	0.330	-0.60	1.23	0.00	0.00	0.00	0.70	7.50	6.06	0.22

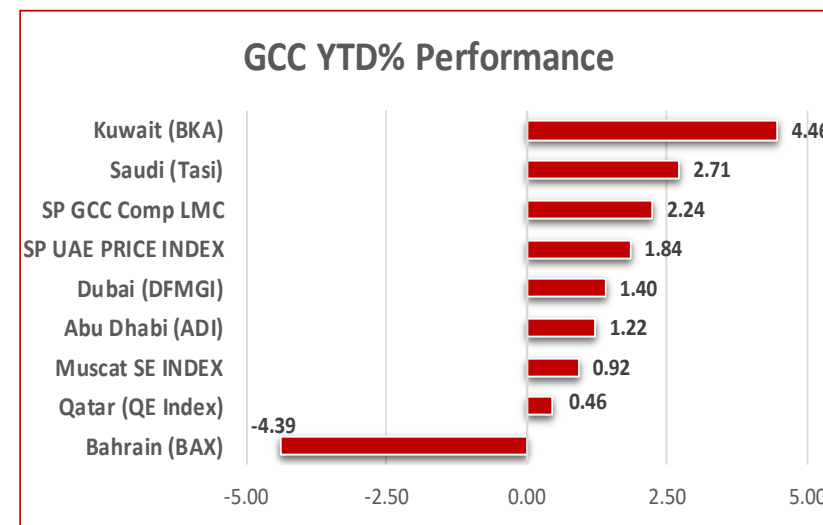
* GCC Markets performance at the latest close.

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 0.90%, the best performing sector today is energy at 7.31%.

KSA

Saudi Armco had a flat performance, SABIC had a negative performance at -1.91% , STC had a negative performance at -0.71%, Al Rajhi Bank had a positive performance today at 0.62% .

UAE

ETISALAT.AD had a positive performance today at 1.20%, FAB.AD had a negative performance today at -0.56%.



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