

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 27th January 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

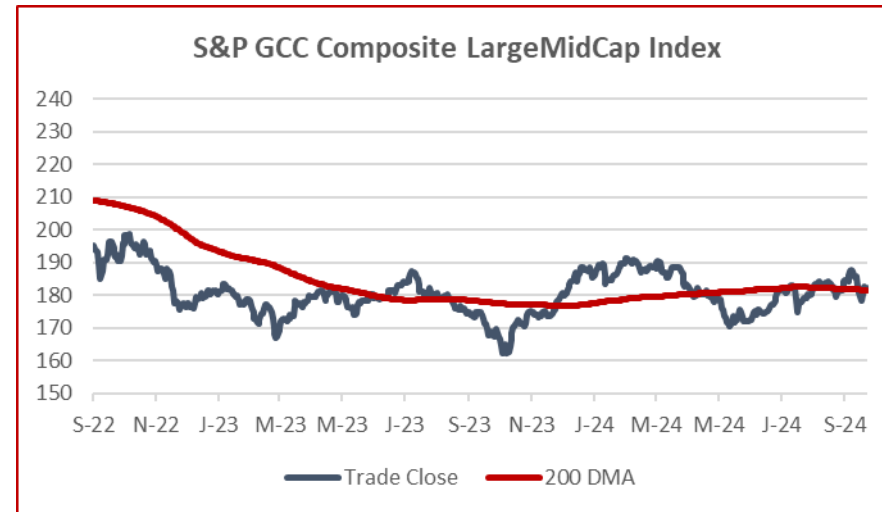


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,386.2	0.26	0.26	2.90	2.90	2.90	2.49	21.08	3.25	10,329.60
Qatar (QE Index)	10,650.5	-0.09	-0.09	0.75	0.75	0.75	1.21	11.60	4.28	537.57
Dubai (DFMGI)	5,225.5	-0.44	0.26	1.30	1.30	1.30	1.86	10.46	4.50	787.32
Abu Dhabi (ADI)	9,563.9	0.22	0.68	1.54	1.54	1.54	2.77	16.89	2.07	2,737.65
Bahrain (BAX)	1,900.2	0.20	0.20	-4.32	-4.32	-4.32	0.87	8.95	4.80	7.23
Muscat SE INDEX	4,553.3	-1.10	-1.10	-0.51	-0.51	-0.51	0.83	9.65	5.94	7.30
SP GCC Comp LMC	193.0	0.26	0.26	2.71	2.71	2.71	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.6	0.00	0.00	2.84	2.84	2.84				

Developed Markets										
MSCI World Index	3,856.8	0.02	2.09	4.02	4.02	4.02				
U.S. (S&P 500)	6,101.2	-0.29	1.74	3.73	3.73	3.73	5.05	27.99	1.50	54,541.65
U.K. (FTSE 100)	8,502.4	-0.73	-0.03	4.03	4.03	4.03	1.73	16.25	3.61	2,197.06
Japan (topix)	2,751.0	-0.03	2.67	-1.22	-1.22	-1.22	1.44	14.53	2.26	962,932.17
Emerging Markets										
MSCI EM Index	1,090.0	0.80	1.86	1.35	1.35	1.35				
China (SSE Composite)	3,252.6	0.70	0.33	-2.96	-2.96	-2.96	1.36	12.00		44,025.04
India (Sensex)	76,190.5	-0.43	-0.56	-2.49	-2.49	-2.49	4.11	21.98	1.22	150,578.81

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,777.0	1.32	1.32	5.63	5.63	5.63	1.58	16.20	3.75	46.25
Kuwait Premier Index	8,295.7	1.60	1.60	5.83	5.83	5.83	1.68	17.06	3.66	37.33
Kuwait Main Index	7,237.0	0.10	0.10	4.77	4.77	4.77	1.27	13.10	4.21	8.92
Kuwait Sector										
Banking	1,951.1	1.76	1.76	7.81	7.81	7.81	1.90	18.58	2.86	28.74
Telecom	1,002.8	-0.19	-0.19	-1.47	-1.47	-1.47	1.47	12.46	8.37	3.07
Industrials	722.5	0.82	0.82	-0.15	-0.15	-0.15	0.81	11.62	11.14	2.43
Financial Services	1,534.3	0.63	0.63	1.57	1.57	1.57	1.25	12.81	2.75	5.09
Real Estate	1,479.1	1.23	1.23	9.31	9.31	9.31	1.12	16.49	1.95	3.10
Basic Materials	875.1	-1.32	-1.32	-3.96	-3.96	-3.96	1.59	11.48	9.88	0.50
Health Care	463.6	0.00	0.00	1.16	1.16	1.16	1.55	14.95	2.26	
Consumer Staples	1,022.7	1.12	1.12	2.40	2.40	2.40	2.20	20.61	2.03	0.31
Insurance	2,035.3	2.96	2.96	-0.97	-0.97	-0.97	1.08	9.80	4.01	0.80
Consumer Discretionary	2,249.0	0.26	0.26	5.95	5.95	5.95				
Energy	1,299.2	-0.44	-0.44	9.25	9.25	9.25	1.08	10.05	4.87	0.26
Technology	1,025.8	-1.40	-1.40	-1.40	-1.40	-1.40	1.21			0.01
Utilities	394.7	-1.96	-1.96	-0.66	-0.66	-0.66				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell more than 1% on Monday after U.S. President Trump called on OPEC to reduce prices following the announcement of wide-ranging measures to boost U.S. oil and gas output in his first week in office. Brent crude futures dropped 87 cents, or 1.11%, to \$77.63 a barrel by 0043 GMT after settling up 21 cents on Friday.

Kuwait Market

The market closed up by 1.32% at 7,777.0 value traded 97.2 million KD, Premier market value reached 67.8 million KD, closed up by 1.60% at 8,295.7

KSA Market

The market closed up by 0.26% at 12,386.2



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.970	2.11	2.11	8.26	8.26	8.26	1.83	14.30	3.49	8.09
KFH	0.796	2.18	2.18	6.70	6.70	6.70	2.29	21.70	2.41	13.64
ZAIN	0.452	-0.22	-0.22	-3.62	-3.62	-3.62	1.70	10.93	7.74	1.96
BOUBYAN BANK	0.632	1.61	1.61	12.66	12.66	12.66	2.56	30.58	1.19	2.66
AGILITY	0.246	3.36	3.36	-0.40	-0.40	-0.40	0.64	10.27	8.13	0.66
Saudi Arabia										
ARAMCO	28.05	-0.18	-0.18	0.00	0.00	0.00	4.56	16.55	6.87	6,788.10
SABIC	67.50	-0.44	-0.44	0.75	0.75	0.75	1.22	81.96	5.04	202.50
STC	42.45	0.12	0.12	6.13	6.13	6.13	2.67	16.67	3.77	212.25
AL-RAJHI BANK	96.00	0.10	0.10	1.48	1.48	1.48	3.26	21.94	2.50	384.00
NCB	34.60	0.29	0.29	3.59	3.59	3.59	1.12	10.39	5.20	207.60
Abu Dhabi										
ETISALAT.AD	17.10	0.94	4.52	4.78	4.78	4.78	3.44	13.43	4.77	148.71
FAB.AD	14.36	0.98	0.42	4.51	4.51	4.51	1.23	9.83	4.94	158.64
EMIRATES NBD	22.40	-0.22	0.67	4.43	4.43	4.43	1.15	6.28	5.36	141.49
DB ISLAMIC DB	7.51	-1.05	2.74	5.92	5.92	5.92	1.18	7.78	5.99	54.38
EMAR.DU	13.30	-1.48	3.91	3.50	3.50	3.50	1.46	9.87	3.76	117.56
Qatar										
QNB	16.750	0.90	0.90	-3.12	-3.12	-3.12	1.37	9.93	3.91	154.71
INDUSTREIS QAT	13.650	0.66	0.66	2.86	2.86	2.86	2.24	15.46	5.13	82.58
QA ISLAMIC BK	20.580	0.59	0.59	-3.65	-3.65	-3.65	1.56	11.09	2.98	48.63
MASRAF AL RAYA	2.400	-3.81	-3.81	-2.56	-2.56	-2.56	0.89	15.28	4.17	22.32
MESAEED PETRO	1.522	-1.49	-1.49	1.81	1.81	1.81	1.18	23.89	4.60	19.12
Oman										
BANK MUSCAT	0.255	-3.04	-3.04	1.19	1.19	1.19	0.80	9.51	6.08	1.91
OMANTEL	0.906	-0.44	-0.44	-3.62	-3.62	-3.62	1.07	10.72	6.62	0.68
BANK DHOFAR	0.156	0.00	0.00	0.00	0.00	0.00	0.64	17.49	5.13	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	0.327	-1.51	-1.51	-0.91	-0.91	-0.91	0.69	7.43	6.12	0.22

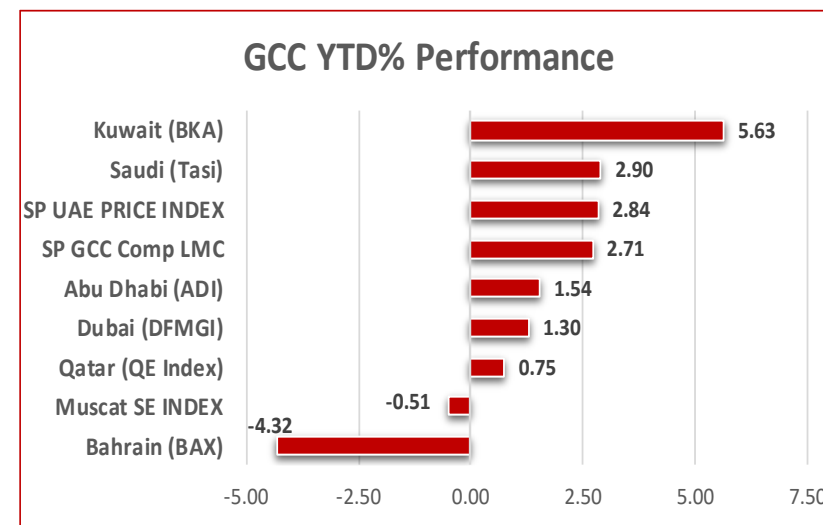
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
15-Jan. 25	24.75%	15.80%	0.06%	3.78%	8.81%	17.86%	13.27%	6.16%	6.32%
22-Jan. 25	24.76%	15.19%	0.06%	3.80%	9.00%	17.85%	13.25%	6.27%	6.44%

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 1.32%, the best performing sector today is insurance at 2.96%.

KSA

Saudi Armco had a negative performance at -0.18%, SABIC had a negative performance at -0.44% , STC had a positive performance at 0.12%, Al Rajhi Bank had a positive performance today at 0.10% .

UAE

ETISALAT.AD had a positive performance today at 0.94%, FAB.AD had a positive performance today at 0.98%.



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw