

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, 28<sup>th</sup> January 2025



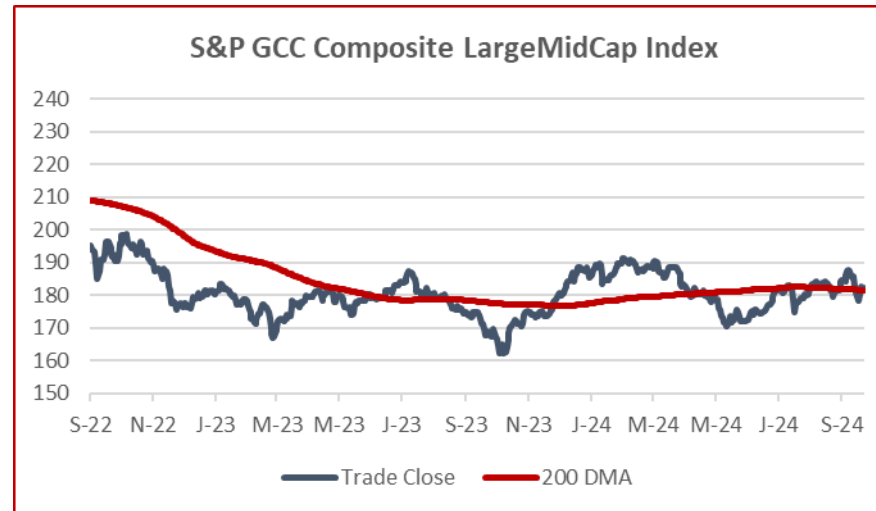


| * Market Watch     | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)       | 12,372.9    | -0.11 | 0.15  | 2.79  | 2.79  | 2.79  | 2.49 | 20.99 | 3.26           | 10,298.85             |
| Qatar (QE Index)   | 10,666.9    | 0.15  | 0.06  | 0.91  | 0.91  | 0.91  | 1.22 | 11.62 | 4.28           | 538.34                |
| Dubai (DFMGI)      | 5,191.7     | -0.65 | -0.65 | 0.64  | 0.64  | 0.64  | 1.85 | 10.40 | 4.53           | 782.53                |
| Abu Dhabi (ADI)    | 9,552.6     | -0.12 | -0.12 | 1.42  | 1.42  | 1.42  | 2.76 | 16.87 | 2.07           | 2,733.87              |
| Bahrain (BAX)      | 1,890.1     | -0.53 | -0.33 | -4.82 | -4.82 | -4.82 | 0.86 | 8.86  | 4.85           | 7.19                  |
| Muscat SE INDEX    | 4,561.1     | 0.17  | -0.93 | -0.34 | -0.34 | -0.34 | 0.83 | 9.67  | 5.96           | 7.31                  |
| SP GCC Comp LMC    | 193.0       | 0.00  | 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  |      |       |                |                       |

|                          |          |       |       |       |       |       |      |       |      |            |
|--------------------------|----------|-------|-------|-------|-------|-------|------|-------|------|------------|
| <b>Developed Markets</b> |          |       |       |       |       |       |      |       |      |            |
| MSCI World Index         | 3,813.3  | -1.13 | -1.13 | 2.85  | 2.85  | 2.85  |      |       |      |            |
| U.S. (S&P 500)           | 6,012.3  | -1.46 | -1.46 | 2.22  | 2.22  | 2.22  | 5.05 | 27.99 | 1.50 | 54,541.65  |
| U.K. (FTSE 100)          | 8,503.7  | 0.02  | 0.02  | 4.05  | 4.05  | 4.05  | 1.73 | 16.25 | 3.60 | 2,197.06   |
| Japan (topix)            | 2,758.1  | 0.26  | 0.26  | -0.96 | -0.96 | -0.96 | 1.44 | 14.56 | 2.26 | 965,607.72 |
| <b>Emerging Markets</b>  |          |       |       |       |       |       |      |       |      |            |
| MSCI EM Index            | 1,087.5  | -0.23 | -0.23 | 1.12  | 1.12  | 1.12  |      |       |      |            |
| China (SSE Composite)    | 3,250.6  | -0.06 | -0.06 | -3.02 | -3.02 | -3.02 | 1.36 | 12.00 |      | 44,025.04  |
| India (Sensex)           | 75,366.2 | -1.08 | -1.08 | -3.55 | -3.55 | -3.55 | 4.07 | 21.65 | 1.23 | 148,709.89 |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |       |       |      |       |                |                       |
| Kuwait All Share Index | 7,830.8     | 0.69  | 2.02  | 6.36  | 6.36  | 6.36  | 1.60 | 16.42 | 3.70           | 46.86                 |
| Kuwait Premier Index   | 8,361.1     | 0.79  | 2.40  | 6.66  | 6.66  | 6.66  | 1.70 | 17.34 | 3.60           | 37.93                 |
| Kuwait Main Index      | 7,256.9     | 0.28  | 0.37  | 5.06  | 5.06  | 5.06  | 1.27 | 13.15 | 4.20           | 8.93                  |
| <b>Kuwait Sector</b>   |             |       |       |       |       |       |      |       |                |                       |
| Banking                | 1,966.3     | 0.78  | 2.55  | 8.64  | 8.64  | 8.64  | 1.94 | 18.90 | 2.81           | 29.25                 |
| Telecom                | 1,005.9     | 0.31  | 0.12  | -1.16 | -1.16 | -1.16 | 1.47 | 12.44 | 8.38           | 3.06                  |
| Industrials            | 732.4       | 1.37  | 2.20  | 1.21  | 1.21  | 1.21  | 0.81 | 11.73 | 11.05          | 2.45                  |
| Financial Services     | 1,539.0     | 0.31  | 0.94  | 1.88  | 1.88  | 1.88  | 1.26 | 12.90 | 2.73           | 5.12                  |
| Real Estate            | 1,487.0     | 0.54  | 1.77  | 9.90  | 9.90  | 9.90  | 1.13 | 16.80 | 1.92           | 3.14                  |
| Basic Materials        | 897.7       | 2.58  | 1.23  | -1.49 | -1.49 | -1.49 | 1.57 | 11.32 | 10.01          | 0.49                  |
| Health Care            | 463.6       | 0.00  | 0.00  | 1.16  | 1.16  | 1.16  | 1.55 | 14.95 | 2.26           |                       |
| Consumer Staples       | 1,032.3     | 0.94  | 2.07  | 3.36  | 3.36  | 3.36  | 2.22 | 20.84 | 2.01           | 0.31                  |
| Insurance              | 2,010.7     | -1.21 | 1.72  | -2.17 | -2.17 | -2.17 | 1.11 | 10.09 | 3.89           | 0.82                  |
| Consumer Discretionary | 2,270.0     | 0.93  | 1.19  | 6.94  | 6.94  | 6.94  |      |       |                |                       |
| Energy                 | 1,294.7     | -0.35 | -0.78 | 8.87  | 8.87  | 8.87  | 1.08 | 10.00 | 4.89           | 0.26                  |
| Technology             | 1,011.2     | -1.42 | -2.80 | -2.80 | -2.80 | -2.80 | 1.19 |       |                | 0.01                  |
| Utilities              | 400.0       | 1.33  | -0.65 | 0.66  | 0.66  | 0.66  |      |       |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

Oil prices ticked up but hovered near a two-week low on Tuesday after weak economic data from China and warming weather forecasts elsewhere soured the demand outlook. Brent crude oil futures rose by 42 cents, or 0.54%, to \$77.5 per barrel by 0430 GMT. U.S. West Texas Intermediate crude futures were up 34 cents, or 0.46%, to \$73.51. Brent settled on Monday at its lowest since Jan. 9, while WTI hit its lowest since Jan. 2.

#### Kuwait Market

The market closed up by 0.69% at 7,830.8 value traded 131.0 million KD, Premier market value reached 101.5 million KD, closed up by 0.79% at 8,361.1

#### KSA Market

The market closed down by -0.11% at 12,372.9



| * Description          | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |       |      |       |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |       |      |       |                |                       |
| NBK                    | 0.988       | 1.86  | 4.00  | 10.27 | 10.27 | 10.27 | 1.86 | 14.57 | 3.42           | 8.22                  |
| KFH                    | 0.796       | 0.00  | 2.18  | 6.70  | 6.70  | 6.70  | 2.29 | 21.70 | 2.41           | 13.61                 |
| ZAIN                   | 0.452       | 0.00  | -0.22 | -3.62 | -3.62 | -3.62 | 1.70 | 10.93 | 7.74           | 1.95                  |
| BOUBYAN BANK           | 0.638       | 0.95  | 2.57  | 13.73 | 13.73 | 13.73 | 2.58 | 30.87 | 1.18           | 2.68                  |
| AGILITY                | 0.253       | 2.85  | 6.30  | 2.43  | 2.43  | 2.43  | 0.66 | 10.56 | 7.91           | 0.68                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |       |      |       |                |                       |
| ARAMCO                 | 27.95       | -0.36 | -0.53 | -0.36 | -0.36 | -0.36 | 4.54 | 16.49 | 6.89           | 6,765.34              |
| SABIC                  | 67.60       | 0.15  | -0.29 | 0.90  | 0.90  | 0.90  | 1.23 | 82.08 | 5.03           | 202.84                |
| STC                    | 42.35       | -0.24 | -0.12 | 5.88  | 5.88  | 5.88  | 2.66 | 16.63 | 3.78           | 211.80                |
| AL-RAJHI BANK          | 95.50       | -0.52 | -0.42 | 0.95  | 0.95  | 0.95  | 3.24 | 21.83 | 2.51           | 382.08                |
| NCB                    | 34.50       | -0.29 | 0.00  | 3.29  | 3.29  | 3.29  | 1.12 | 10.36 | 5.22           | 207.04                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |       |      |       |                |                       |
| ETISALAT.AD            | 17.12       | 0.12  | 0.12  | 4.90  | 4.90  | 4.90  | 3.45 | 13.45 | 4.76           | 148.88                |
| FAB.AD                 | 14.24       | -0.84 | -0.84 | 3.64  | 3.64  | 3.64  | 1.22 | 9.74  | 4.99           | 157.31                |
| EMIRATES NBD           | 22.65       | 1.12  | 1.12  | 5.59  | 5.59  | 5.59  | 1.16 | 6.35  | 5.30           | 143.07                |
| DB ISLAMIC DB          | 7.50        | -0.13 | -0.13 | 5.78  | 5.78  | 5.78  | 1.18 | 7.77  | 6.00           | 54.30                 |
| EMAR.DU                | 13.00       | -2.26 | -2.26 | 1.17  | 1.17  | 1.17  | 1.43 | 9.64  | 3.85           | 114.90                |
| <b>Qatar</b>           |             |       |       |       |       |       |      |       |                |                       |
| QNB                    | 16.790      | 0.24  | 1.14  | -2.89 | -2.89 | -2.89 | 1.37 | 9.96  | 3.90           | 155.08                |
| INDUSTREIS QAT         | 13.500      | -1.10 | -0.44 | 1.73  | 1.73  | 1.73  | 2.21 | 15.29 | 5.19           | 81.68                 |
| QA ISLAMIC BK          | 20.700      | 0.58  | 1.17  | -3.09 | -3.09 | -3.09 | 1.57 | 11.15 | 2.96           | 48.91                 |
| MASRAF AL RAYA         | 2.401       | 0.04  | -3.77 | -2.52 | -2.52 | -2.52 | 0.89 | 15.28 | 4.16           | 22.33                 |
| MESAIEED PETRO         | 1.518       | -0.26 | -1.75 | 1.54  | 1.54  | 1.54  | 1.18 | 23.82 | 4.61           | 19.07                 |
| <b>Oman</b>            |             |       |       |       |       |       |      |       |                |                       |
| BANK MUSCAT            | 0.255       | 0.00  | -3.04 | 1.19  | 1.19  | 1.19  | 0.80 | 9.51  | 6.08           | 1.91                  |
| OMANTEL                | 0.899       | -0.77 | -1.21 | -4.36 | -4.36 | -4.36 | 1.06 | 10.64 | 6.67           | 0.67                  |
| 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  | 3.21           | 0.48                  |
| OMINVEST               | 0.332       | 1.53  | 0.00  | 0.61  | 0.61  | 0.61  | 0.70 | 7.54  | 6.02           | 0.22                  |

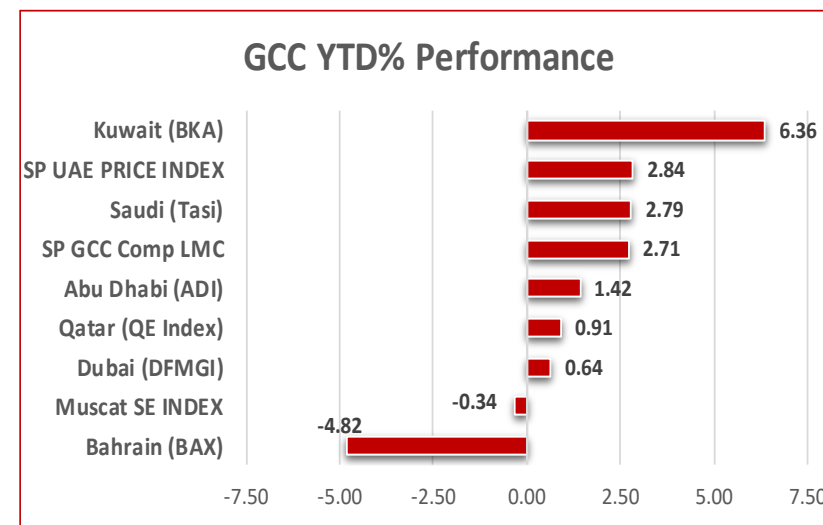
\* GCC Markets performance at the latest close.

| 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 0.69%, the best performing sector today is basic materials at 2.58%.

### KSA

Saudi Armco had a negative performance at -0.36%, SABIC had a positive performance at 0.15% , STC had a negative performance at -0.24%, Al Rajhi Bank had a negative performance today at -0.52% .

### UAE

ETISALAT.AD had a positive performance today at 0.12%, FAB.AD had a negative performance today at -0.84%.



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