



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

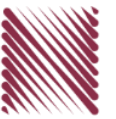
## GCC DAILY MORNING BRIEF

Sunday, 2<sup>nd</sup> February 2025



# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



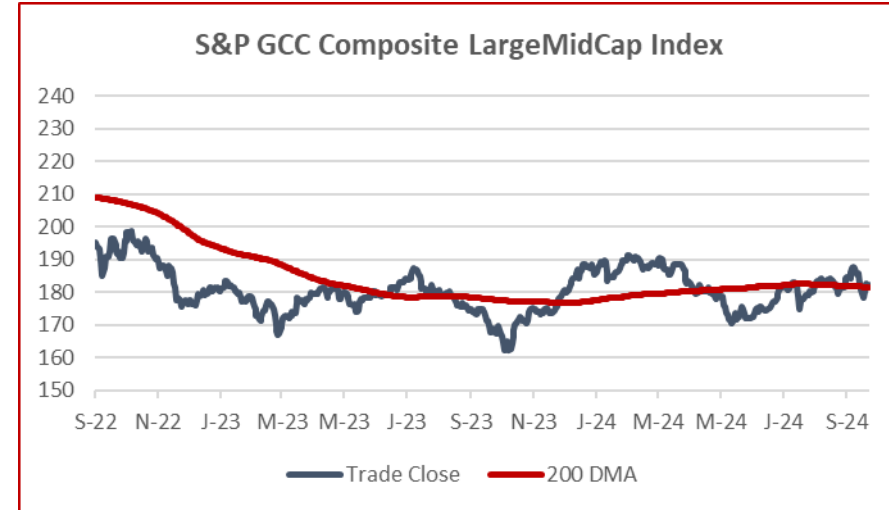
| * Market Watch     | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)       | 12,415.5    | -0.19 | 0.50  | 3.15  | 3.15  | 3.15  | 2.37 | 19.64 | 3.41           | 10,276.60             |
| Qatar (QE Index)   | 10,666.7    | -0.13 | 0.06  | 0.90  | 0.90  | 0.90  | 1.21 | 11.55 | 4.29           | 538.65                |
| Dubai (DFMGI)      | 5,180.4     | 0.49  | -0.86 | 0.42  | 0.42  | 0.42  | 1.78 | 10.34 | 4.46           | 777.12                |
| Abu Dhabi (ADI)    | 9,586.1     | 0.03  | 0.23  | 1.77  | 1.77  | 1.77  | 2.74 | 16.95 | 2.11           | 2,728.90              |
| Bahrain (BAX)      | 1,879.5     | 0.31  | -0.89 | -5.36 | -5.36 | -5.36 | 0.86 | 8.79  | 4.88           | 7.15                  |
| Muscat SE INDEX    | 4,543.2     | -0.50 | -1.32 | -0.73 | -0.73 | -0.73 | 0.82 | 9.53  | 5.98           | 7.29                  |
| SP GCC Comp LMC    | 193.0       | 0.01  | 0.26  | 2.71  | 2.71  | 2.71  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX | 155.9       | -0.08 | -0.45 | 2.38  | 2.38  | 2.38  |      |       |                |                       |

|                          |         |       |       |      |      |      |      |       |      |            |
|--------------------------|---------|-------|-------|------|------|------|------|-------|------|------------|
| <b>Developed Markets</b> |         |       |       |      |      |      |      |       |      |            |
| MSCI World Index         | 3,836.6 | -0.44 | -0.52 | 3.47 | 3.47 | 3.47 |      |       |      |            |
| U.S. (S&P 500)           | 6,040.5 | -0.50 | -1.00 | 2.70 | 2.70 | 2.70 | 4.97 | 27.47 | 1.52 | 54,038.56  |
| U.K. (FTSE 100)          | 8,674.0 | 0.31  | 2.02  | 6.13 | 6.13 | 6.13 | 1.76 | 16.45 | 3.53 | 2,241.40   |
| Japan (topix)            | 2,788.7 | 0.24  | 1.37  | 0.13 | 0.13 | 0.13 | 1.46 | 14.53 | 2.24 | 971,759.93 |

|                         |          |       |       |       |       |       |      |       |      |            |
|-------------------------|----------|-------|-------|-------|-------|-------|------|-------|------|------------|
| <b>Emerging Markets</b> |          |       |       |       |       |       |      |       |      |            |
| MSCI EM Index           | 1,093.4  | -0.22 | 0.31  | 1.66  | 1.66  | 1.66  |      |       |      |            |
| 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)          | 77,506.0 | 0.01  | 1.73  | 0.01  | -0.81 | -0.81 | 4.19 | 22.29 | 1.20 | 152,791.67 |

| 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 | 7,784.7     | -0.15 | 1.42  | 5.73  | 5.73  | 5.73  | 1.60 | 15.36 | 3.70           | 46.90                 |
| Kuwait Premier Index   | 8,300.6     | -0.24 | 1.66  | 5.89  | 5.89  | 5.89  | 1.70 | 15.92 | 3.60           | 37.95                 |
| Kuwait Main Index      | 7,256.7     | 0.24  | 0.37  | 5.06  | 5.06  | 5.06  | 1.28 | 13.18 | 4.19           | 8.95                  |
| <b>Kuwait Sector</b>   |             |       |       |       |       |       |      |       |                |                       |
| Banking                | 1,941.9     | -0.73 | 1.28  | 7.30  | 7.30  | 7.30  | 1.93 | 16.68 | 2.82           | 29.10                 |
| Telecom                | 1,013.2     | 1.14  | 0.84  | -0.45 | -0.45 | -0.45 | 1.48 | 12.57 | 8.30           | 3.10                  |
| Industrials            | 736.5       | 0.58  | 2.77  | 1.77  | 1.77  | 1.77  | 0.83 | 11.95 | 10.84          | 2.50                  |
| Financial Services     | 1,538.1     | 0.70  | 0.88  | 1.82  | 1.82  | 1.82  | 1.26 | 12.93 | 2.72           | 5.14                  |
| Real Estate            | 1,502.7     | 0.93  | 2.85  | 11.05 | 11.05 | 11.05 | 1.13 | 17.22 | 1.89           | 3.19                  |
| Basic Materials        | 881.3       | -1.42 | -0.62 | -3.28 | -3.28 | -3.28 | 1.59 | 11.40 | 9.94           | 0.50                  |
| Health Care            | 463.6       | 0.00  | 0.00  | 1.16  | 1.16  | 1.16  | 1.55 | 14.95 | 2.26           |                       |
| Consumer Staples       | 1,031.6     | 3.01  | 2.00  | 3.29  | 3.29  | 3.29  | 2.24 | 21.02 | 1.99           | 0.31                  |
| Insurance              | 2,041.8     | 0.06  | 3.29  | -0.65 | -0.65 | -0.65 | 1.11 | 10.13 | 3.88           | 0.83                  |
| Consumer Discretionary | 2,283.4     | 0.98  | 1.79  | 7.57  | 7.57  | 7.57  |      |       |                |                       |
| Energy                 | 1,328.5     | 3.59  | 1.81  | 11.72 | 11.72 | 11.72 | 1.10 | 10.24 | 4.78           | 0.27                  |
| Technology             | 1,047.6     | 2.86  | 0.70  | 0.70  | 0.70  | 0.70  | 1.22 |       |                | 0.01                  |
| Utilities              | 400.0       | 0.00  | -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 eased on Friday and closed the week lower as investors awaited 25% tariffs by the United States on Canada and Mexico, expected on Saturday. Brent crude futures for March, which expire on Friday, settled down 11 cents at \$76.76 a barrel. The more actively traded second month futures were down 31 cents, at \$75.58.

#### Kuwait Market

The market closed down by -0.15% at 7,784.7 value traded 108.4 million KD, Premier market value reached 75.8 million KD, closed down by -0.24% at 8,300.6

#### KSA Market

The market closed down by -0.19% at 12,415.5



| * 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                    | 0.964       | -1.13 | 1.47  | 7.59  | 7.59  | 7.59  | 1.76 | 13.88 | 3.51           | 8.03                  |
| KFH                    | 0.786       | -1.13 | 0.90  | 5.36  | 5.36  | 5.36  | 2.20 | 16.94 | 2.44           | 13.45                 |
| ZAIN                   | 0.454       | 0.89  | 0.22  | -3.20 | -3.20 | -3.20 | 1.71 | 10.98 | 7.71           | 1.96                  |
| BOUBYAN BANK           | 0.628       | -1.26 | 0.96  | 11.94 | 11.94 | 11.94 | 2.54 | 30.38 | 1.20           | 2.64                  |
| AGILITY                | 0.252       | -0.79 | 5.88  | 2.02  | 2.02  | 2.02  | 0.66 | 10.52 | 7.94           | 0.67                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |       |      |       |                |                       |
| ARAMCO                 | 27.80       | 0.18  | -1.07 | -0.89 | -0.89 | -0.89 | 4.52 | 16.40 | 6.93           | 6,727.60              |
| SABIC                  | 67.00       | -0.30 | -1.18 | 0.00  | 0.00  | 0.00  | 1.21 | 81.35 | 5.07           | 201.00                |
| STC                    | 43.50       | -0.57 | 2.59  | 8.75  | 8.75  | 8.75  | 2.74 | 17.08 | 3.68           | 217.50                |
| AL-RAJHI BANK          | 99.00       | -1.39 | 3.23  | 4.65  | 4.65  | 4.65  | 3.36 | 22.63 | 2.42           | 396.00                |
| NCB                    | 34.20       | 0.44  | -0.87 | 2.40  | 2.40  | 2.40  | 1.11 | 10.27 | 5.56           | 205.20                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |       |      |       |                |                       |
| ETISALAT.AD            | 17.50       | -2.29 | 0.00  | 4.78  | 4.78  | 4.78  | 3.44 | 13.43 | 4.77           | 148.71                |
| FAB.AD                 | 14.50       | 0.28  | 1.25  | 5.82  | 5.82  | 5.82  | 1.25 | 9.95  | 4.88           | 160.63                |
| EMIRATES NBD           | 20.85       | 0.72  | -6.92 | -2.80 | -2.80 | -2.80 | 1.05 | 5.86  | 4.80           | 131.70                |
| DB ISLAMIC DB          | 7.70        | 1.32  | 2.53  | 8.60  | 8.60  | 8.60  | 1.21 | 7.98  | 5.84           | 55.75                 |
| EMAR.DU                | 13.50       | 0.00  | 1.50  | 5.06  | 5.06  | 5.06  | 1.48 | 10.01 | 3.70           | 119.32                |
| <b>Qatar</b>           |             |       |       |       |       |       |      |       |                |                       |
| QNB                    | 16.700      | -0.60 | 0.60  | -3.41 | -3.41 | -3.41 | 1.36 | 9.90  | 3.92           | 154.25                |
| INDUSTREIS QAT         | 13.730      | -0.07 | 1.25  | 3.47  | 3.47  | 3.47  | 2.25 | 15.55 | 5.10           | 83.07                 |
| QA ISLAMIC BK          | 20.600      | 0.00  | 0.68  | -3.56 | -3.56 | -3.56 | 1.56 | 11.10 | 2.97           | 48.68                 |
| MASRAF AL RAYA         | 2.388       | -0.21 | -4.29 | -3.05 | -3.05 | -3.05 | 0.89 | 15.20 | 4.19           | 22.21                 |
| MESAIEED PETRO         | 1.530       | 1.93  | -0.97 | 2.34  | 2.34  | 2.34  | 1.18 | 24.01 | 4.58           | 19.22                 |
| <b>Oman</b>            |             |       |       |       |       |       |      |       |                |                       |
| BANK MUSCAT            | 0.256       | -0.39 | -2.66 | 1.59  | 1.59  | 1.59  | 0.80 | 9.55  | 6.05           | 1.92                  |
| OMANTEL                | 0.899       | -0.11 | -1.21 | -4.36 | -4.36 | -4.36 | 1.06 | 10.64 | 6.67           | 0.67                  |
| BANK DHOFAR            | 0.151       | -3.21 | -3.21 | -3.21 | -3.21 | -3.21 | 0.61 | 13.71 | 5.30           | 0.45                  |
| NAT BANK OF OMAN       | 0.294       | 0.00  | 0.34  | -0.68 | -0.68 | -0.68 | 0.62 | 9.50  | 3.20           | 0.48                  |
| OMINVEST               | 0.330       | -0.60 | -0.60 | 0.00  | 0.00  | 0.00  | 0.70 | 7.50  | 6.06           | 0.22                  |

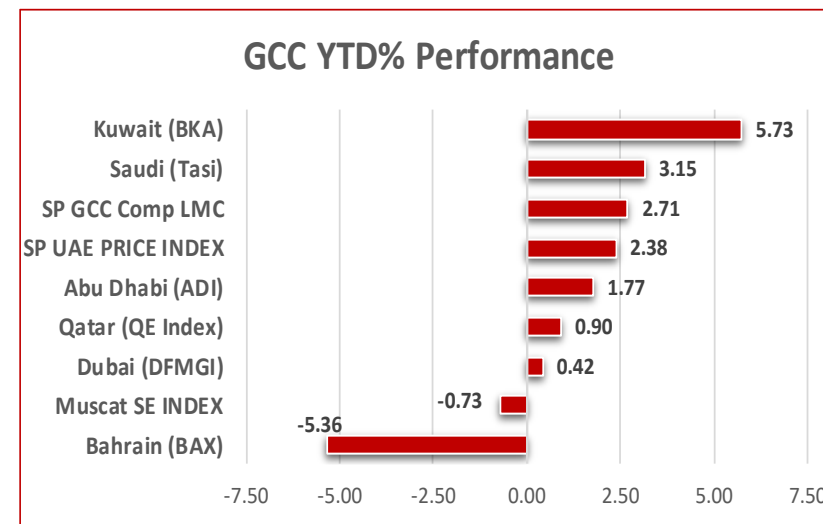
\* GCC Markets performance at the latest close.

| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 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 down today by -0.15%, the best performing sector today is energy at 3.59%.

### KSA

Saudi Armco had a positive performance at 0.18%, SABIC had a negative performance at -0.30% , STC had a negative performance at -0.57%, Al Rajhi Bank had a negative performance today at -1.39% .

### UAE

ETISALAT.AD had a negative performance today at -2.29%, FAB.AD had a positive performance today at 0.28%.



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