

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

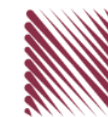
GCC DAILY MORNING BRIEF

Monday, 3rd February 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

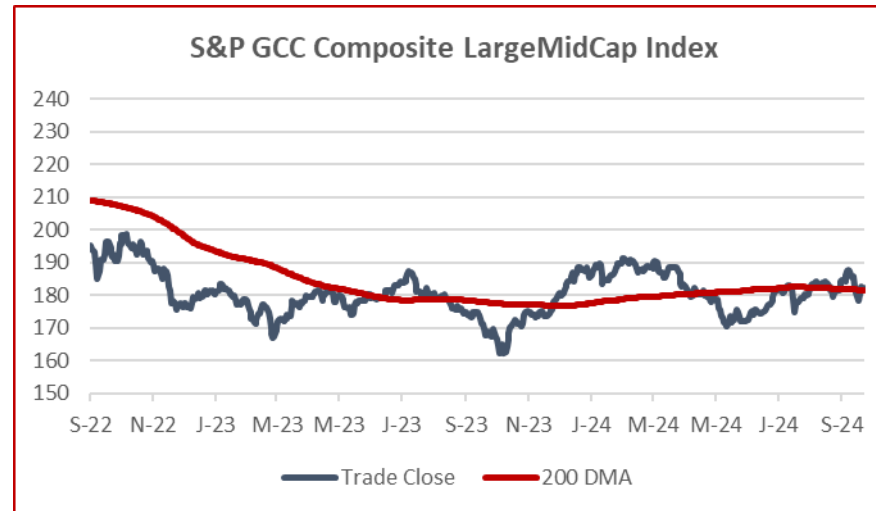


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,409.9	-0.05	-0.05	-0.05	3.10	3.10	2.37	19.64	3.41	10,265.93
Qatar (QE Index)	10,699.8	0.31	0.31	0.31	1.22	1.22	1.22	11.61	4.47	540.87
Dubai (DFMGI)	5,180.4	0.49	-0.86	0.42	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)	1,875.3	-0.22	-0.22	-0.22	-5.57	-5.57	0.85	8.75	4.90	7.13
Muscat SE INDEX	4,555.9	0.28	0.28	0.28	-0.45	-0.45	0.81	9.57	5.95	7.32
SP GCC Comp LMC	193.2	0.13	0.13	0.13	2.84	2.84	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.9	0.00	0.00	0.00	2.38	2.38				

Developed Markets										
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	1.75	16.38	3.53	2,237.75
Japan (topix)	2,788.7	0.24	1.37	0.13	0.13	0.13	1.46	14.53	2.24	971,759.93
Emerging Markets										
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)
Kuwait										
Kuwait All Share Index	7,824.0	0.50	0.50	0.50	6.27	6.27	1.60	15.36	3.70	46.90
Kuwait Premier Index	8,351.1	0.61	0.61	0.61	6.54	6.54	1.70	15.92	3.60	37.95
Kuwait Main Index	7,260.8	0.06	0.06	0.06	5.12	5.12	1.28	13.18	4.19	8.95
Kuwait Sector										
Banking	1,953.5	0.59	0.59	0.59	7.94	7.94	1.93	16.68	2.82	29.10
Telecom	1,010.9	-0.22	-0.22	-0.22	-0.67	-0.67	1.48	12.57	8.30	3.10
Industrials	743.2	0.92	0.92	0.92	2.71	2.71	0.83	11.95	10.84	2.50
Financial Services	1,545.7	0.50	0.50	0.50	2.33	2.33	1.26	12.93	2.72	5.14
Real Estate	1,516.5	0.92	0.92	0.92	12.07	12.07	1.13	17.22	1.89	3.19
Basic Materials	872.8	-0.97	-0.97	-0.97	-4.22	-4.22	1.59	11.40	9.94	0.50
Health Care	463.6	0.00	0.00	0.00	1.16	1.16	1.55	14.95	2.26	
Consumer Staples	1,012.1	-1.89	-1.89	-1.89	1.34	1.34	2.24	21.02	1.99	0.31
Insurance	2,032.2	-0.47	-0.47	-0.47	-1.12	-1.12	1.11	10.13	3.88	0.83
Consumer Discretionary	2,300.2	0.73	0.73	0.73	8.35	8.35				
Energy	1,313.3	-1.14	-1.14	-1.14	10.44	10.44	1.10	10.24	4.78	0.27
Technology	1,047.6	0.00	0.00	0.00	0.70	0.70	1.22			0.01
Utilities	400.0	0.00	0.00	0.00	0.66	0.66				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

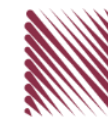
Oil prices eased on Friday and closed the week lower as investors awaited 25% tariffs by the United States on Canada and Mexico, expected on Saturday. Brent crude futures for March, which expire on Friday, settled down 11 cents at \$76.76 a barrel. The more actively traded second month futures were down 31 cents, at \$75.58.

Kuwait Market

The market closed up by 0.50% at 7,824.0 value traded 110.2 million KD, Premier market value reached 55.1 million KD, closed up by 0.61% at 8,351.1

KSA Market

The market closed down by -0.05% at 12,409.9



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.982	1.87	1.87	1.87	9.60	9.60	1.80	14.14	3.44	8.18
KFH	0.786	0.00	0.00	0.00	5.36	5.36	2.20	16.94	2.44	13.45
ZAIN	0.454	0.00	0.00	0.00	-3.20	-3.20	1.71	10.98	7.71	1.96
BOUBYAN BANK	0.623	-0.80	-0.80	-0.80	11.05	11.05	2.46	28.83	1.21	2.62
AGILITY	0.253	0.40	0.40	0.40	2.43	2.43	0.66	10.56	7.91	0.68
Saudi Arabia										
ARAMCO	27.75	-0.18	-0.18	-0.18	-1.07	-1.07	4.51	16.37	6.94	6,715.50
SABIC	67.20	0.30	0.30	0.30	0.30	0.30	1.22	81.59	5.06	201.60
STC	43.80	0.69	0.69	0.69	9.50	9.50	2.76	17.20	3.65	219.00
AL-RAJHI BANK	98.80	-0.20	-0.20	-0.20	4.44	4.44	3.36	22.58	2.43	395.20
NCB	34.45	0.73	0.73	0.73	3.14	3.14	1.12	10.34	5.52	206.70
Abu Dhabi										
ETISALAT.AD	17.10	-2.29	0.00	4.78	4.78	4.78	3.44	13.43	4.77	148.71
FAB.AD	14.54	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
Qatar										
QNB	16.820	0.72	0.72	0.72	-2.72	-2.72	1.37	9.98	4.16	155.36
INDUSTREIS QAT	13.900	1.24	1.24	1.24	4.75	4.75	2.28	15.74	5.04	84.10
QA ISLAMIC BK	20.760	0.78	0.78	0.78	-2.81	-2.81	1.57	11.18	3.85	49.05
MASRAF AL RAYA	2.392	0.17	0.17	0.17	-2.88	-2.88	0.89	15.23	4.18	22.25
MESAIEED PETRO	1.487	-2.81	-2.81	-2.81	-0.54	-0.54	1.14	25.99	4.71	18.68
Oman										
BANK MUSCAT	0.259	1.17	1.17	1.17	2.78	2.78	0.80	9.62	5.98	1.94
OMANTEL	0.899	0.00	0.00	0.00	-4.36	-4.36	1.06	10.64	6.67	0.67
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	0.294	0.00	0.00	0.00	-0.68	-0.68	0.62	9.50	3.20	0.48
OMINVEST	0.330	0.00	0.00	0.00	0.00	0.00	0.70	7.50	6.06	0.22

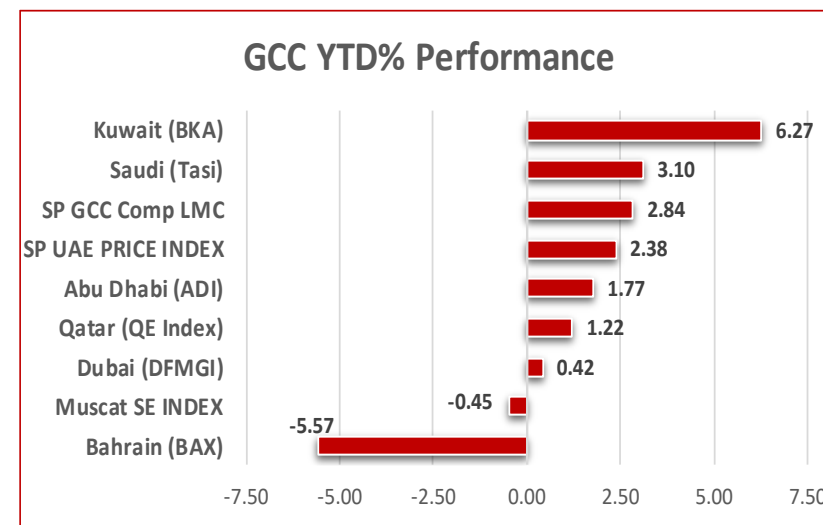
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
22-Jan. 25	24.76%	15.19%	0.06%	3.80%	9.00%	17.85%	13.25%	6.27%	6.44%
29-Jan. 25	24.78%	15.04%	0.06%	3.86%	9.31%	17.92%	13.29%	6.39%	6.42%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



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Kuwait

The market is up today by 0.50%, the best performing sector today is real estate at 0.92%.

KSA

Saudi Armco had a negative performance at -0.18%, SABIC had a positive performance at 0.30% , STC had a positive performance at 0.69%, Al Rajhi Bank had a negative performance today at -0.20% .

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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