

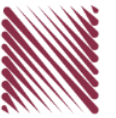


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 4th February 2025



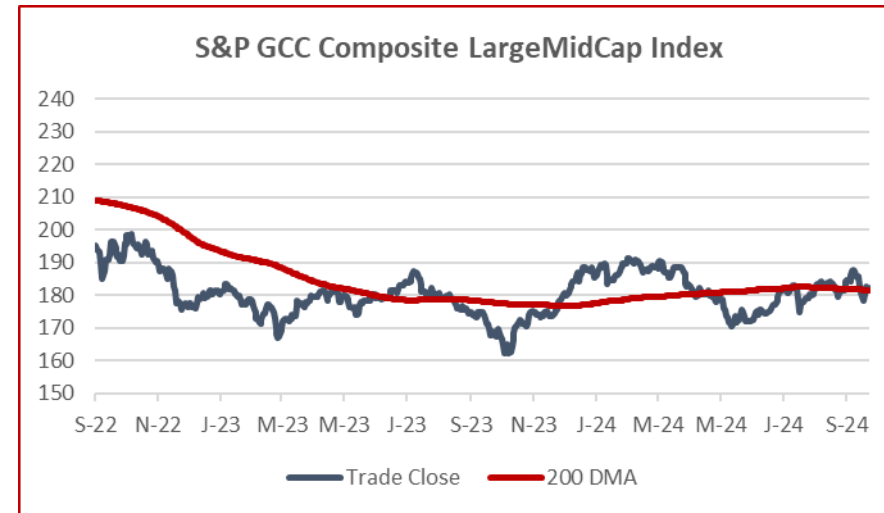


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,377.0	-0.26	-0.31	-0.31	2.83	2.83	2.37	19.56	3.42	10,239.48
Qatar (QE Index)	10,632.3	-0.63	-0.32	-0.32	0.58	0.58	1.21	11.53	4.48	536.65
Dubai (DFMGI)	5,182.8	0.05	0.05	0.05	0.47	0.47	1.78	10.35	4.51	777.91
Abu Dhabi (ADI)	9,575.8	-0.11	-0.11	-0.11	1.67	1.67	2.74	16.94	2.11	2,725.47
Bahrain (BAX)	1,869.6	-0.30	-0.53	-0.53	-5.86	-5.86	0.85	8.72	4.91	7.11
Muscat SE INDEX	4,553.4	-0.05	0.22	0.22	-0.51	-0.51	0.81	9.56	5.96	7.31
SP GCC Comp LMC	193.2	0.00	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	3,796.5	-1.04	-1.04	-1.04	2.39	2.39				
U.S. (S&P 500)	5,994.6	-0.76	-0.76	-0.76	1.92	1.92	4.97	27.47	1.52	54,034.00
U.K. (FTSE 100)	8,583.6	-1.04	-1.04	-1.04	5.02	5.02	1.74	16.21	3.57	2,214.20
Japan (topix)	2,720.4	-2.45	-2.45	-2.45	-2.32	-2.32	1.43	14.19	2.29	948,630.14
Emerging Markets										
MSCI EM Index	1,073.7	-1.80	-1.80	-1.80	-0.16	-0.16				
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)	77,186.7	-0.41	-0.41	-0.40	-1.22	-1.22	4.17	22.23	1.21	152,278.53

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,855.0	0.40	0.90	0.90	6.69	6.69	1.61	15.44	3.68	47.13
Kuwait Premier Index	8,404.6	0.64	1.25	1.25	7.22	7.22	1.71	16.02	3.58	38.18
Kuwait Main Index	7,212.6	-0.66	-0.61	-0.61	4.42	4.42	1.28	13.17	4.19	8.96
Kuwait Sector										
Banking	1,968.4	0.76	1.36	1.36	8.76	8.76	1.94	16.78	2.81	29.27
Telecom	1,025.6	1.45	1.23	1.23	0.77	0.77	1.48	12.54	8.31	3.09
Industrials	742.6	-0.09	0.83	0.83	2.61	2.61	0.84	12.07	10.75	2.52
Financial Services	1,531.7	-0.91	-0.41	-0.41	1.40	1.40	1.27	12.97	2.70	5.16
Real Estate	1,507.7	-0.58	0.33	0.33	11.42	11.42	1.14	17.38	1.88	3.22
Basic Materials	880.4	0.87	-0.11	-0.11	-3.39	-3.39	1.57	11.29	10.04	0.49
Health Care	448.4	-3.28	-3.28	-3.28	-2.16	-2.16	1.55	14.95	2.26	
Consumer Staples	1,015.8	0.37	-1.53	-1.53	1.72	1.72	2.20	20.62	2.03	0.31
Insurance	1,978.3	-2.66	-3.11	-3.11	-3.75	-3.75	1.11	10.08	3.90	0.82
Consumer Discretionary	2,312.4	0.53	1.27	1.27	8.93	8.93				
Energy	1,323.1	0.75	-0.40	-0.40	11.27	11.27	1.09	10.12	4.84	0.27
Technology	1,018.5	-2.78	-2.78	-2.78	-2.10	-2.10	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 retreated on Tuesday after U.S. President Donald Trump agreed to hold off imposing steep tariffs on Mexico and Canada, the two biggest foreign oil suppliers to the United States, for a month. Brent futures fell 41 cents, or 0.5%, to \$75.55 a barrel at 0149 GMT, while U.S. West Texas Intermediate (WTI) crude declined 75 cents, or 1%, to trade at \$72.41.

Kuwait Market

The market closed up by 0.40% at 7,855.0 value traded 140.5 million KD, Premier market value reached 75.9 million KD, closed up by 0.64% at 8,404.6

KSA Market

The market closed down by -0.26% at 12,377.0



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.994	1.22	3.11	3.11	10.94	10.94	1.82	14.31	3.40	8.28
KFH	0.790	0.51	0.51	0.51	5.90	5.90	2.22	17.03	2.43	13.52
ZAIN	0.459	1.10	1.10	1.10	-2.13	-2.13	1.73	11.10	7.63	1.99
BOUBYAN BANK	0.635	1.93	1.11	1.11	13.19	13.19	2.51	29.38	1.19	2.67
AGILITY	0.255	0.79	1.19	1.19	3.24	3.24	0.67	10.64	7.84	0.68
Saudi Arabia										
ARAMCO	27.70	-0.18	-0.36	-0.36	-1.25	-1.25	4.50	16.34	6.95	6,703.40
SABIC	67.10	-0.15	0.15	0.15	0.15	0.15	1.22	81.47	5.07	201.30
STC	43.65	-0.34	0.34	0.34	9.13	9.13	2.75	17.14	3.67	218.25
AL-RAJHI BANK	100.20	1.42	1.21	1.21	5.92	5.92	3.40	22.90	2.40	400.80
NCB	34.35	-0.29	0.44	0.44	2.84	2.84	1.12	10.31	5.53	206.10
Abu Dhabi										
ETISALAT.AD	17.30	1.17	1.17	1.17	6.00	6.00	3.48	13.59	4.71	150.45
FAB.AD	14.54	0.00	0.00	0.00	5.82	5.82	1.25	9.95	4.88	160.63
EMIRATES NBD	20.65	-0.96	-0.96	-0.96	-3.73	-3.73	1.04	5.80	4.84	130.44
DB ISLAMIC DB	7.81	1.43	1.43	1.43	10.16	10.16	1.23	8.09	5.76	56.55
EMAR.DU	13.45	-0.37	-0.37	-0.37	4.67	4.67	1.48	9.98	3.72	118.88
Qatar										
QNB	16.700	-0.71	0.00	0.00	-3.41	-3.41	1.36	9.90	4.19	154.25
INDUSTREIS QAT	13.390	-3.67	-2.48	-2.48	0.90	0.90	2.15	18.04	5.23	81.01
QA ISLAMIC BK	20.870	0.53	1.31	1.31	-2.29	-2.29	1.58	11.24	3.83	49.31
MASRAF AL RAYA	2.387	-0.21	-0.04	-0.04	-3.09	-3.09	0.89	15.19	4.19	22.20
MESAEED PETRO	1.484	-0.20	-3.01	-3.01	-0.74	-0.74	1.14	25.94	3.84	18.64
Oman										
BANK MUSCAT	0.259	0.00	1.17	1.17	2.78	2.78	0.80	9.62	5.98	1.94
OMANTEL	0.900	0.11	0.11	0.11	-4.26	-4.26	1.06	10.65	6.67	0.68
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	0.300	2.04	2.04	2.04	1.35	1.35	0.64	9.69	3.13	0.49
OMINVEST	0.332	0.61	0.61	0.61	0.61	0.61	0.70	7.54	6.02	0.22

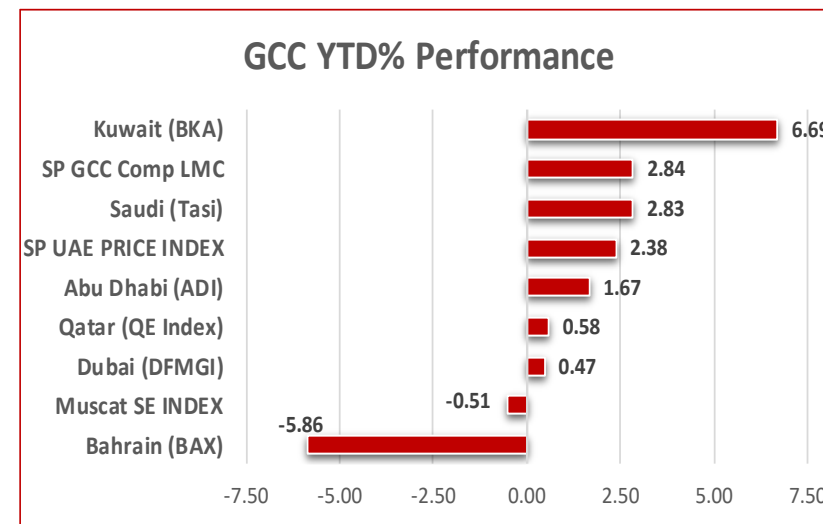
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
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



* GCC Markets performance at the latest close.

Kuwait

The market is up today by 0.40%, the best performing sector today is telecom at 1.45%.

KSA

Saudi Armco had a negative performance at -0.18%, SABIC had a negative performance at -0.15% , STC had a negative performance at -0.34%, Al Rajhi Bank had a positive performance today at 1.42% .

UAE

ETISALAT.AD had a positive performance today at 1.17%, FAB.AD had a flat performance today.



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