

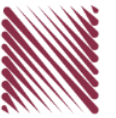


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 5th February 2025





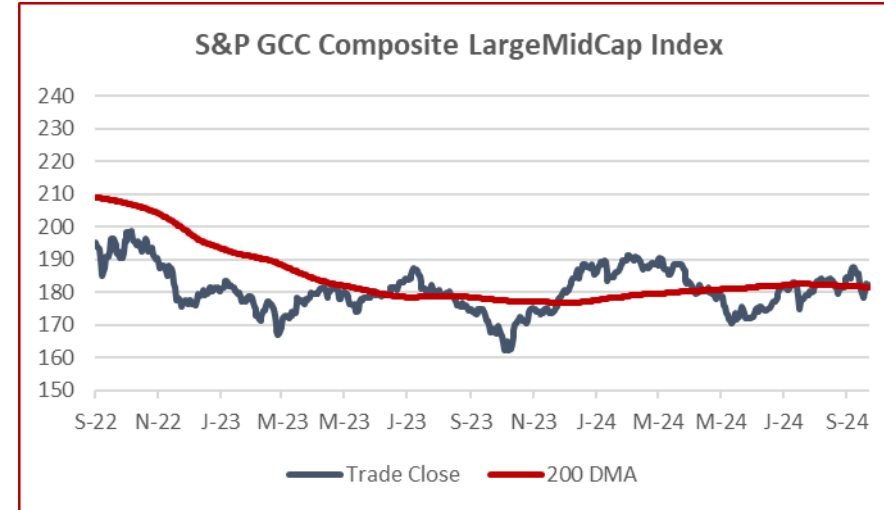
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,433.9	0.46	0.15	0.15	3.30	3.30	2.38	19.67	3.40	10,258.44
Qatar (QE Index)	10,658.8	0.25	-0.07	-0.07	0.83	0.83	1.21	11.64	4.51	537.87
Dubai (DFMGI)	5,219.1	0.70	0.75	0.75	1.17	1.17	1.80	10.42	4.48	783.71
Abu Dhabi (ADI)	9,584.5	0.09	-0.02	-0.02	1.76	1.76	2.74	16.95	2.12	2,735.02
Bahrain (BAX)	1,864.8	-0.26	-0.78	-0.78	-6.10	-6.10	0.85	8.68	4.93	7.09
Muscat SE INDEX	4,586.9	0.74	0.96	0.96	0.23	0.23	0.81	9.62	5.93	7.36
SP GCC Comp LMC	194.3	0.55	0.70	0.70	3.43	3.43	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.5	0.41	0.40	0.40	2.79	2.79				

Developed Markets										
MSCI World Index	3,826.4	0.79	-0.27	-0.27	3.20	3.20				
U.S. (S&P 500)	6,037.9	0.72	-0.04	-0.04	2.66	2.66	4.93	27.27	1.53	53,634.58
U.K. (FTSE 100)	8,570.8	-0.15	-1.19	-1.19	4.87	4.87	1.74	16.17	3.58	2,210.83
Japan (topix)	2,738.0	0.65	-1.82	-1.82	-1.68	-1.68	1.44	14.19	2.28	954,225.74

Emerging Markets										
MSCI EM Index	1,092.9	1.79	-0.04	-0.04	1.62	1.62				
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)	78,583.8	1.81	1.39	1.40	0.57	0.57	4.25	22.64	1.18	155,241.77

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,904.0	0.62	1.53	1.53	7.35	7.35	1.62	15.50	3.58	47.32
Kuwait Premier Index	8,452.4	0.57	1.83	1.83	7.83	7.83	1.72	16.12	3.45	38.42
Kuwait Main Index	7,274.9	0.86	0.25	0.25	5.32	5.32	1.27	13.09	4.22	8.90
Kuwait Sector										
Banking	1,977.4	0.46	1.83	1.83	9.26	9.26	1.95	16.90	2.78	29.50
Telecom	1,033.7	0.79	2.03	2.03	1.57	1.57	1.50	12.72	8.20	3.13
Industrials	748.2	0.76	1.59	1.59	3.39	3.39	0.84	12.06	9.16	2.52
Financial Services	1,530.1	-0.10	-0.52	-0.52	1.29	1.29	1.26	12.87	2.73	5.11
Real Estate	1,528.6	1.39	1.72	1.72	12.97	12.97	1.13	17.28	1.89	3.20
Basic Materials	915.0	3.93	3.82	3.82	0.41	0.41	1.58	11.39	9.95	0.50
Health Care	448.4	0.00	-3.28	-3.28	-2.16	-2.16	1.50	14.46	2.34	
Consumer Staples	1,009.3	-0.64	-2.16	-2.16	1.07	1.07	2.21	20.70	2.02	0.31
Insurance	2,085.4	5.41	2.13	2.13	1.47	1.47	1.08	9.81	4.01	0.80
Consumer Discretionary	2,329.2	0.72	2.00	2.00	9.72	9.72				
Energy	1,332.8	0.73	0.32	0.32	12.08	12.08	1.10	10.20	4.80	0.27
Technology	1,033.1	1.43	-1.39	-1.39	-0.70	-0.70	1.18			0.01
Utilities	402.6	0.66	0.66	0.66	1.32	1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were little changed on Wednesday after volatile trading in the previous session as investors shrugged off the impact of China's tariffs on U.S. energy imports though President Donald Trump's renewed push to eliminate Iranian crude exports provided some support. Brent crude futures were down 18 cents, or 0.24%, at \$76.02 a barrel by 0210 GMT. U.S.

Kuwait Market

The market closed up by 0.62% at 7,904.0 value traded 123.3 million KD, Premier market value reached 62.5 million KD, closed up by 0.57% at 8,452.4

KSA Market

The market closed up by 0.46% at 12,433.9



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.995	0.10	3.22	3.22	11.05	11.05	1.82	14.33	3.40	8.28
KFH	0.797	0.89	1.40	1.40	6.84	6.84	2.23	17.18	2.41	13.63
ZAIN	0.462	0.65	1.76	1.76	-1.49	-1.49	1.74	11.18	7.58	2.00
BOUBYAN BANK	0.638	0.47	1.59	1.59	13.73	13.73	2.52	29.52	1.18	2.68
AGILITY	0.264	3.53	4.76	4.76	6.88	6.88	0.69	11.02	7.58	0.71
Saudi Arabia										
ARAMCO	27.70	0.00	-0.36	-0.36	-1.25	-1.25	4.50	16.34	6.95	6,703.22
SABIC	67.10	0.00	0.15	0.15	0.15	0.15	1.22	81.47	5.07	201.29
STC	44.25	1.37	1.72	1.72	10.63	10.63	2.78	17.37	3.62	221.24
AL-RAJHI BANK	101.80	1.60	2.83	2.83	7.61	7.61	3.46	23.27	2.36	407.19
NCB	34.45	0.29	0.73	0.73	3.14	3.14	1.12	10.34	5.52	206.69
Abu Dhabi										
ETISALAT.AD	17.14	-0.92	0.23	0.23	5.02	5.02	3.45	13.46	4.75	149.05
FAB.AD	14.48	-0.41	-0.41	-0.41	5.39	5.39	1.24	9.91	4.90	159.96
EMIRATES NBD	20.80	0.73	-0.24	-0.24	-3.03	-3.03	1.04	5.84	4.81	131.38
DB ISLAMIC DB	7.83	0.26	1.69	1.69	10.44	10.44	1.23	8.11	5.75	56.69
EMAR.DU	13.55	0.74	0.37	0.37	5.45	5.45	1.49	10.05	3.69	119.76
Qatar										
QNB	16.750	0.30	0.30	0.30	-3.12	-3.12	1.37	9.93	4.18	154.71
INDUSTREIS QAT	13.450	0.45	-2.04	-2.04	1.36	1.36	2.16	18.12	5.50	81.37
QA ISLAMIC BK	20.870	0.00	1.31	1.31	-2.29	-2.29	1.58	11.24	3.83	49.31
MASRAF AL RAYA	2.380	-0.29	-0.34	-0.34	-3.37	-3.37	0.88	15.15	4.20	22.13
MESAIEED PETRO	1.470	-0.94	-3.92	-3.92	-1.67	-1.67	1.13	25.69	3.88	18.47
Oman										
BANK MUSCAT	0.259	0.00	1.17	1.17	2.78	2.78	0.80	9.62	5.98	1.94
OMANTEL	0.905	0.56	0.67	0.67	-3.72	-3.72	1.07	10.71	6.63	0.68
BANK DHOFAR	0.158	4.64	4.64	4.64	1.28	1.28	0.64	14.35	5.06	0.47
NAT BANK OF OMAN	0.290	-3.33	-1.36	-1.36	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.335	0.90	1.52	1.52	1.52	1.52	0.71	7.61	5.97	0.22

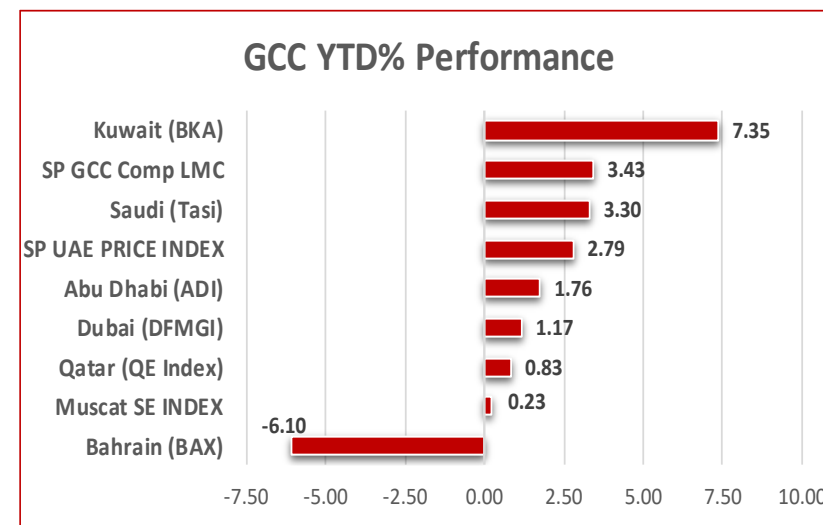
* GCC Markets performance at the latest close.

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 0.62%, the best performing sector today is insurance at 5.41%.

KSA

Both Aramco and Sabic had a flat performance today, STC had a positive performance at 1.37%, Al Rajhi Bank had a positive performance today at 1.60% .

UAE

ETISALAT.AD had a negative performance today at -0.92%, FAB.AD had a negative performance today at -0.41%.



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