



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 5th January 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



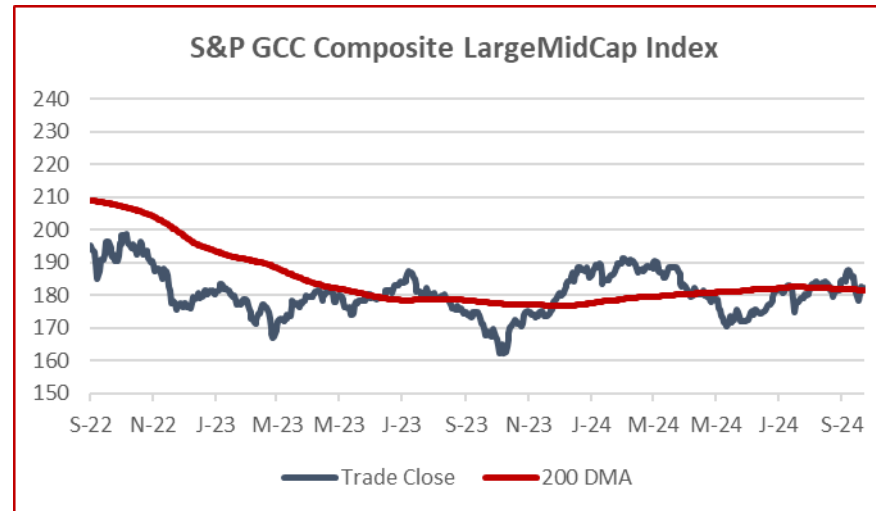
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,102.6	0.21	2.05	0.55	0.55	0.55	2.42	20.45	3.32	10,211.08
Qatar (QE Index)	10,571.1	0.80	1.51	1.47	-0.41	-2.40	1.24	11.73	4.24	534.59
Dubai (DFMGI)	5,126.7	-0.52	-0.06	-0.62	-0.62	-0.62	1.84	10.32	4.57	777.97
Abu Dhabi (ADI)	9,322.8	0.01	-0.05	-1.02	-1.02	-1.02	2.70	16.48	2.10	2,694.86
Bahrain (BAX)	1,979.3	-0.33	-0.34	-0.33	-0.33	-0.33	0.92	9.47	4.56	7.53
Muscat SE INDEX	4,573.3	-0.15	2.35	-0.07	-0.07	-0.07	0.83	9.66	5.93	7.30
SP GCC Comp LMC	188.4	-0.06	1.51	0.29	0.29	0.29	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.2	-0.35	-0.50	-1.35	-1.35	-1.35				

Developed Markets										
MSCI World Index	3,737.5	0.94	-0.48	0.80	0.80	0.80				
U.S. (S&P 500)	5,942.5	1.26	-0.48	1.03	1.03	1.03	4.93	28.05	1.53	53,130.97
U.K. (FTSE 100)	8,224.0	-0.44	0.91	0.62	0.62	0.62	1.67	15.71	3.73	2,128.84
Japan (topix)	2,784.9	-0.60	-0.60	3.89	5.25	17.69	1.46	14.70	2.24	977,709.49

Emerging Markets										
MSCI EM Index	1,073.2	0.21	-0.89	-0.21	-0.21	-0.21				
China (SSE Composite)	3,211.4	-1.57	-5.55	-4.19	-4.19	-4.19	1.36	12.00		44,025.04
India (Sensex)	79,223.1	-0.90	0.67	1.39	1.39	1.39	4.29	23.10	1.17	155,813.41

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,362.5	-0.19	0.16	1.61	3.17	8.00	1.52	15.53	3.62	44.34
Kuwait Premier Index	7,838.8	-0.35	-0.40	0.95	1.69	4.84	1.61	16.38	3.46	35.84
Kuwait Main Index	6,907.3	0.48	2.63	4.52	10.05	24.01	1.22	12.45	4.35	8.50
Kuwait Sector										
Banking	1,809.8	-0.17	0.46	1.97	3.23	9.85	1.80	17.53	3.02	27.12
Telecom	1,017.7	-0.06	-0.62	1.06	-1.01	-7.91	1.49	12.63	8.26	3.11
Industrials	723.6	0.51	0.16	2.33	-0.27	-20.30	0.81	11.73	6.11	2.45
Financial Services	1,510.6	-0.02	-0.23	3.19	7.08	24.61	1.24	12.62	2.75	5.04
Real Estate	1,353.1	-0.62	-1.39	-2.63	-1.64	11.56	1.04	15.29	2.10	2.87
Basic Materials	911.3	-2.85	-1.86	-3.21	12.88	22.16	1.64	11.79	9.61	0.51
Health Care	458.3	0.65	0.65	-2.11	-2.63	-4.95	1.53	14.77	2.29	
Consumer Staples	998.7	-3.19	-4.96	2.67	-0.51	51.64	2.17	20.35	2.06	0.30
Insurance	2,055.2	-3.52	-2.48	3.63	-1.37	-10.36	1.12	10.19	3.86	0.83
Consumer Discretionary	2,122.8	1.51	4.46	0.88	17.52	32.35				
Energy	1,189.1	1.15	0.89	-0.76	6.41	25.30	1.02	9.32	5.34	0.24
Technology	1,040.3	3.62	-0.69	-4.67	-28.14	79.87	1.21			0.01
Utilities	397.4	-0.66	-2.58	-7.93	2.03	-12.72				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices posted weekly gains Friday, underpinned by expectations of further economic stimulus in China and lower U.S. interest rates. Brent crude futures rose 58 cents, or 0.76%, to close at \$76.51 a barrel. U.S. West Texas Intermediate crude gained 83 cents, or 1.13%, to settle at \$73.96 a barrel.

Kuwait Market

The market closed down by -0.19% at 7,362.8 value traded 107.1 million KD, Premier market value reached 74.1 million KD down by -0.35% at 7,838.8.

KSA Market

The market closed up by 0.21% at 12,102.6.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.896	0.90	1.93	2.99	1.47	5.23	1.69	13.21	3.77	7.46
KFH	0.746	-0.27	-0.40	1.08	4.19	12.00	2.15	20.34	2.57	12.76
ZAIN	0.469	0.00	-0.85	1.74	-1.26	-7.50	1.77	11.34	7.46	2.03
BOUBYAN BANK	0.561	-1.06	-1.23	2.56	-1.58	-0.89	2.27	27.14	1.35	2.36
AGILITY	0.247	-1.98	-3.52	-7.14	12.79	-12.79	0.65	10.31	8.10	0.66
Saudi Arabia										
ARAMCO	28.05	0.00	0.18	0.00	0.00	0.00	4.56	16.55	6.87	6,788.10
SABIC	66.90	-0.59	-0.45	-0.15	-0.15	-0.15	1.21	81.23	5.08	200.70
STC	40.85	0.86	1.74	2.13	2.13	2.13	2.57	16.04	3.92	204.25
AL-RAJHI BANK	98.50	3.47	7.18	4.12	4.12	4.12	3.35	22.51	2.44	394.00
NCB	33.25	-0.45	0.30	-0.45	-0.45	-0.45	1.08	9.98	5.41	199.50
Abu Dhabi										
ETISALAT.AD	16.12	0.12	-1.82	-1.10	-1.10	-1.10	3.25	12.68	5.05	140.37
FAB.AD	13.50	-0.74	-1.47	-2.47	-2.47	-2.47	1.15	9.17	5.30	148.04
EMIRATES NBD	20.50	-2.38	-4.21	-4.43	-4.43	-4.43	1.05	5.75	5.85	129.49
DB ISLAMIC DB	7.02	-0.85	-0.57	-0.99	-0.99	-0.99	1.10	7.27	6.41	50.83
EMAR.DU	12.60	-0.79	-1.56	-1.95	-1.95	-1.95	1.38	9.35	3.97	111.37
Qatar										
QNB	17.290	0.99	1.17	1.11	2.01	4.60	1.43	10.51	3.79	159.70
INDUSTREIS QAT	13.270	0.99	2.08	2.23	1.76	1.45	2.18	15.03	5.28	80.28
QA ISLAMIC BK	21.360	1.62	2.89	2.10	0.05	-0.65	1.66	11.75	2.87	50.47
MASRAF AL RAYA	2.463	-0.20	-0.73	2.41	-0.28	-7.23	0.92	15.73	4.06	22.91
MESAIEED PETRO	1.495	-0.47	0.07	-2.42	-8.28	-16.39	1.16	23.46	4.68	18.78
Oman										
BANK MUSCAT	0.253	0.00	0.80	0.40	0.40	0.40	0.79	9.44	6.13	1.90
OMANTEL	0.926	-1.49	-0.11	-1.49	-1.49	-1.49	1.09	10.96	6.48	0.69
BANK DHOFAR	0.156	0.00	4.00	0.00	0.00	0.00	0.64	17.49	4.97	0.47
NAT BANK OF OMAN	0.295	-0.34	-0.34	-0.34	-0.34	-0.34	0.68	10.06	2.88	0.48
OMINVEST	0.329	-0.30	2.81	-0.30	-0.30	-0.30	0.70	7.47	6.08	0.22

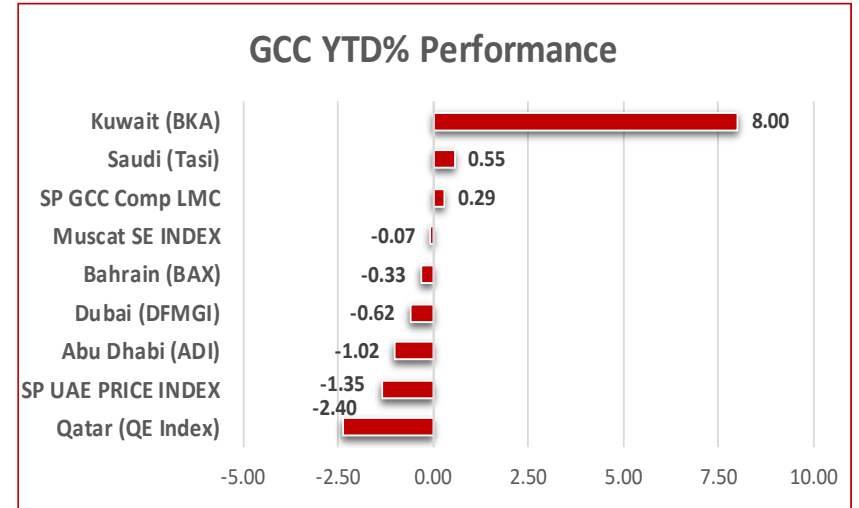
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-Dec. 24	24.67%	15.99%	0.06%	3.73%	8.59%	17.80%	13.21%	5.98%	6.13%
25-Dec. 24	24.68%	15.88%	0.06%	3.74%	8.57%	17.80%	13.28%	5.93%	6.09%

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 -0.19%, the best performing sector today is technology at 3.62%.

KSA

Saudi Armco had a flat performance today, SABIC have negative performance today at -0.59%, STC had a positive performance today at 0.86%, Al Rajhi Bank has a positive performance today at 3.47 %.

UAE

ETISALAT.AD has positive performance today by 0.12%, FAB.AD had a negative performance today at -0.74%.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw