

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 6th February 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

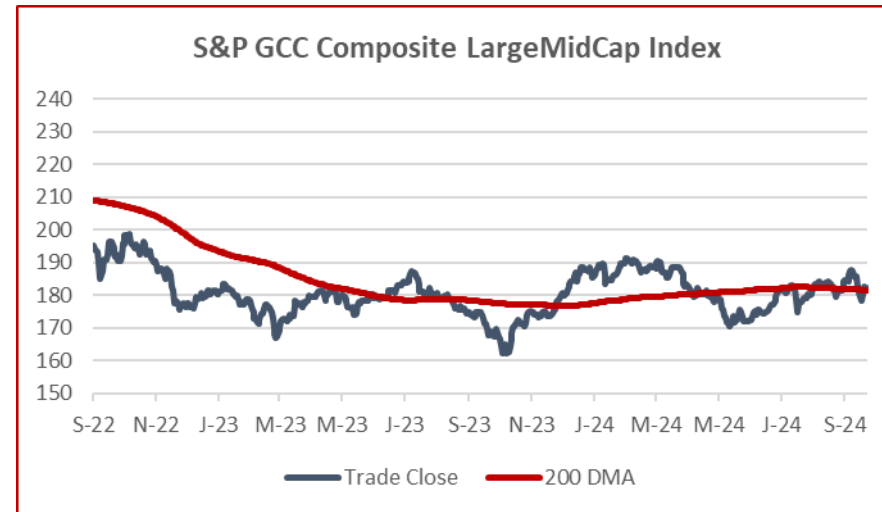


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,414.4	-0.16	-0.01	-0.01	3.14	3.14	2.37	19.60	3.41	10,250.50
Qatar (QE Index)	10,657.4	-0.01	-0.09	-0.09	0.82	0.82	1.21	11.58	4.51	538.05
Dubai (DFMGI)	5,218.9	0.00	0.74	0.74	1.17	1.17	1.80	10.43	4.48	783.32
Abu Dhabi (ADI)	9,584.9	0.00	-0.01	-0.01	1.76	1.76	2.74	16.94	2.12	2,737.87
Bahrain (BAX)	1,873.2	0.45	-0.33	-0.33	-5.68	-5.68	0.85	8.73	4.91	7.13
Muscat SE INDEX	4,573.3	-0.30	0.66	0.66	-0.07	-0.07	0.81	9.57	5.95	7.32
SP GCC Comp LMC	193.9	-0.21	0.49	0.49	3.21	3.21	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.4	-0.03	0.37	0.37	2.76	2.76				

Developed Markets										
MSCI World Index	3,848.7	0.58	0.31	0.31	3.80	3.80				
U.S. (S&P 500)	6,061.5	0.39	0.35	0.35	3.06	3.06	5.08	27.41	1.52	64,304.28
U.K. (FTSE 100)	8,623.3	0.61	-0.58	-0.58	5.51	5.51	1.75	16.34	3.55	2,223.68
Japan (topix)	2,745.4	0.27	-1.55	-1.55	-1.42	-1.42	1.44	13.96	2.27	957,250.64
Emerging Markets										
MSCI EM Index	1,095.8	0.26	0.22	0.22	1.89	1.89				
China (SSE Composite)	3,229.5	-0.65	-0.65	-0.65	-3.65	-3.65	1.36	12.00		44,025.04
India (Sensex)	78,271.3	-0.40	0.99	0.99	0.17	0.17	4.23	22.56	1.18	154,095.17

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,900.1	-0.05	1.48	1.48	7.30	7.30	1.62	15.58	3.37	47.61
Kuwait Premier Index	8,442.9	-0.11	1.71	1.71	7.71	7.71	1.73	16.19	3.21	38.64
Kuwait Main Index	7,291.6	0.23	0.48	0.48	5.56	5.56	1.28	13.20	4.17	8.97
Kuwait Sector										
Banking	1,974.0	-0.18	1.65	1.65	9.07	9.07	1.96	16.98	2.77	29.63
Telecom	1,047.2	1.31	3.36	3.36	2.90	2.90	1.51	12.83	8.13	3.16
Industrials	746.8	-0.19	1.40	1.40	3.20	3.20	0.84	12.15		2.54
Financial Services	1,529.4	-0.05	-0.57	-0.57	1.24	1.24	1.25	12.84	2.73	5.11
Real Estate	1,516.4	-0.80	0.91	0.91	12.07	12.07	1.15	17.52	1.86	3.25
Basic Materials	907.5	-0.81	2.97	2.97	-0.41	-0.41	1.65	11.84	9.57	0.52
Health Care	448.4	0.00	-3.28	-3.28	-2.16	-2.16	1.50	14.46	2.34	
Consumer Staples	1,010.7	0.14	-2.02	-2.02	1.20	1.20	2.19	20.57	2.04	0.31
Insurance	2,092.8	0.35	2.50	2.50	1.83	1.83	1.14	10.34	3.80	0.84
Consumer Discretionary	2,359.9	1.32	3.35	3.35	11.17	11.17				
Energy	1,329.2	-0.26	0.06	0.06	11.78	11.78	1.11	10.22	4.76	0.27
Technology	1,025.8	-0.70	-2.08	-2.08	-1.40	-1.40	1.20			0.01
Utilities	402.6	0.00	0.66	0.66	1.32	1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

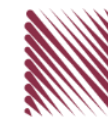
Oil prices ticked up in early Asian trading on Thursday, steadying from a sell-off the previous day after Saudi Arabia's state oil company sharply raised March oil prices. Brent crude futures rose 14 cents, or 0.19%, to \$74.75 a barrel by 0148 GMT. U.S. West Texas Intermediate crude was up 18 cents, or 0.25%, to \$71.21 a barrel.

Kuwait Market

The market closed down by -0.05% at 7,900.1 value traded 172.3 million KD, Premier market value reached 76.5 million KD, closed down by -0.11% at 8,442.9

KSA Market

The market closed down by -0.16% at 12,414.4



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.991	-0.40	2.80	2.80	10.60	10.60	1.81	14.27	3.41	8.25
KFH	0.796	-0.13	1.27	1.27	6.70	6.70	2.23	17.16	2.41	13.62
ZAIN	0.472	2.16	3.96	3.96	0.64	0.64	1.78	11.42	7.42	2.04
BOUBYAN BANK	0.640	0.31	1.91	1.91	14.08	14.08	2.53	29.62	1.18	2.69
AGILITY	0.258	-2.27	2.38	2.38	4.45	4.45	0.67	10.77	7.75	0.69
Saudi Arabia										
ARAMCO	27.70	0.00	-0.36	-0.36	-1.25	-1.25	4.50	16.34	6.95	6,703.58
SABIC	67.30	0.30	0.45	0.45	0.45	0.45	1.22	81.72	5.05	201.91
STC	43.90	-0.79	0.92	0.92	9.75	9.75	2.76	17.24	3.64	219.51
AL-RAJHI BANK	101.20	-0.59	2.22	2.22	6.98	6.98	3.44	23.13	2.37	404.81
NCB	34.50	0.15	0.88	0.88	3.29	3.29	1.12	10.36	5.51	207.01
Abu Dhabi										
ETISALAT.AD	16.94	-1.17	-0.94	-0.94	3.80	3.80	3.41	13.30	4.81	147.32
FAB.AD	14.38	-0.69	-1.10	-1.10	4.66	4.66	1.23	9.84	4.94	158.86
EMIRATES NBD	20.80	0.00	-0.24	-0.24	-3.03	-3.03	1.04	5.84	4.81	131.39
DB ISLAMIC DB	7.74	-1.15	0.52	0.52	9.17	9.17	1.22	8.02	5.81	56.04
EMAR.DU	13.50	-0.37	0.00	0.00	5.06	5.06	1.48	10.01	3.70	119.32
Qatar										
QNB	16.750	0.00	0.30	0.30	-3.12	-3.12	1.37	9.93	4.18	154.71
INDUSTREIS QAT	13.310	-1.04	-3.06	-3.06	0.30	0.30	2.13	17.93	5.56	80.53
QA ISLAMIC BK	20.820	-0.24	1.07	1.07	-2.53	-2.53	1.58	11.21	3.84	49.20
MASRAF AL RAYA	2.380	0.00	-0.34	-0.34	-3.37	-3.37	0.88	15.15	4.20	22.13
MESAIEED PETRO	1.503	2.24	-1.76	-1.76	0.54	0.54	1.15	26.27	3.79	18.88
Oman										
BANK MUSCAT	0.257	-0.77	0.39	0.39	1.98	1.98	0.79	9.55	6.03	1.93
OMANTEL	0.880	-2.76	-2.11	-2.11	-6.38	-6.38	1.04	10.41	6.82	0.66
BANK DHOFAR	0.158	0.00	4.64	4.64	1.28	1.28	0.64	14.35	5.06	0.47
NAT BANK OF OMAN	0.290	0.00	-1.36	-1.36	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.338	0.90	2.42	2.42	2.42	2.42	0.72	7.68	5.92	0.23

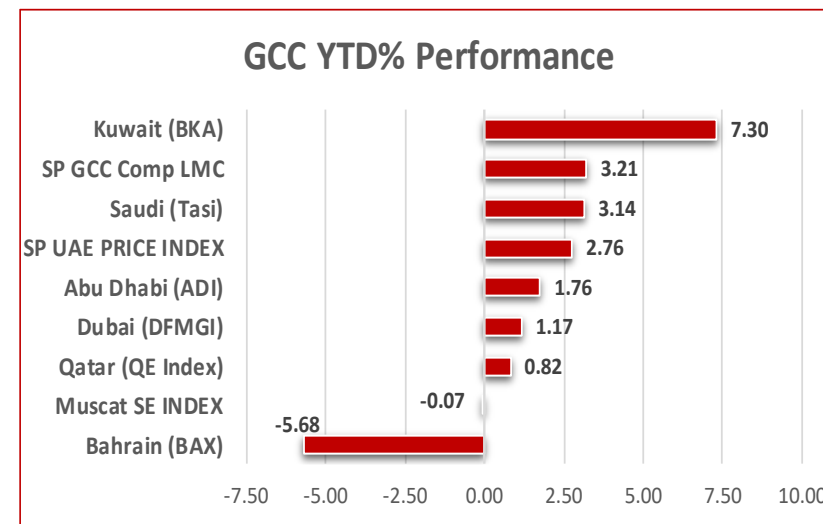
* GCC Markets performance at the latest close.

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 down today by -0.05%, the best performing sector today is consumer discretionary at 1.32%.

KSA

Aramco had a flat performance today, Sabic had a positive performance today at 0.30%, STC had a negative performance at -0.79%, Al Rajhi Bank had a negative performance today at -0.59% .

UAE

ETISALAT.AD had a negative performance today at -1.17%, FAB.AD had a negative performance today at -0.69%.



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