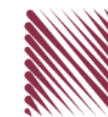


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 6th January 2025



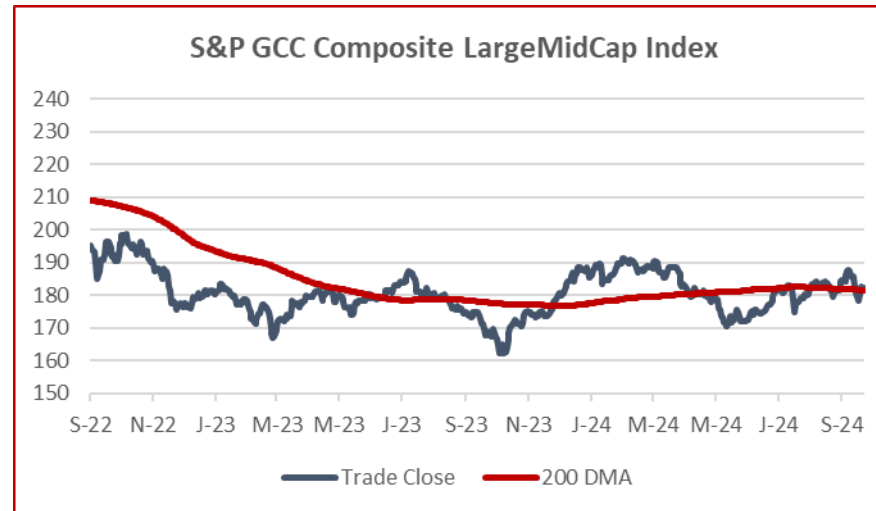


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,069.8	-0.27	-0.27	0.28	0.28	0.28	2.41	20.37	3.33	10,199.01
Qatar (QE Index)	10,478.5	-0.88	-0.88	-0.88	-0.88	-0.88	1.22	11.62	4.28	530.08
Dubai (DFMGI)	5,126.7	-0.52	-0.06	-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	0.00	0.00	-0.33	-0.33	-0.33	0.92	9.47	4.56	7.53
Muscat SE INDEX	4,569.7	-0.08	-0.08	-0.15	-0.15	-0.15	0.83	9.66	5.93	7.30
SP GCC Comp LMC	187.8	-0.34	-0.34	-0.05	-0.05	-0.05	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.2	0.00	0.00	-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	7,416.4	0.73	0.73	0.73	0.73	0.73	1.52	15.53	3.62	44.34
Kuwait Premier Index	7,887.0	0.62	0.62	0.62	0.62	0.62	1.61	16.38	3.46	35.84
Kuwait Main Index	6,991.9	1.23	1.23	1.23	1.23	1.23	1.22	12.45	4.35	8.50
Kuwait Sector										
Banking	1,819.7	0.55	0.55	0.55	0.55	0.55	1.80	17.53	3.02	27.12
Telecom	1,020.0	0.22	0.22	0.22	0.22	0.22	1.49	12.63	8.26	3.11
Industrials	729.9	0.86	0.86	0.86	0.86	0.86	0.81	11.73	6.11	2.45
Financial Services	1,516.5	0.39	0.39	0.39	0.39	0.39	1.24	12.62	2.75	5.04
Real Estate	1,368.1	1.11	1.11	1.11	1.11	1.11	1.04	15.29	2.10	2.87
Basic Materials	935.4	2.65	2.65	2.65	2.65	2.65	1.64	11.79	9.61	0.51
Health Care	458.3	0.00	0.00	0.00	0.00	0.00	1.53	14.77	2.29	
Consumer Staples	1,041.2	4.25	4.25	4.25	4.25	4.25	2.17	20.35	2.06	0.30
Insurance	2,134.8	3.87	3.87	3.87	3.87	3.87	1.12	10.19	3.86	0.83
Consumer Discretionary	2,182.0	2.79	2.79	2.79	2.79	2.79				
Energy	1,187.8	-0.11	-0.11	-0.11	-0.11	-0.11	1.02	9.32	5.34	0.24
Technology	1,040.3	0.00	0.00	0.00	0.00	0.00	1.21			0.01
Utilities	389.5	-1.99	-1.99	-1.99	-1.99	-1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

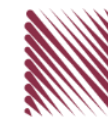
Oil prices hovered at their highest since October on Monday as investors eyed the impact on global fuel demand from colder weather in the Northern Hemisphere and Beijing's economic stimulus measures. Brent crude futures rose 15 cents, or 0.2%, to \$76.66 a barrel by 0125 GMT after settling on Friday at its highest since Oct. 14.

Kuwait Market

The market closed up by 0.73% at 7,416.4 value traded 46.2 million KD, Premier market value reached 26.5 million KD up by 0.62% at 7,887.0.

KSA Market

The market closed down by -0.27% at 12,069.8.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.895	-0.11	-0.11	-0.11	-0.11	-0.11	1.68	13.20	3.78	7.45
KFH	0.749	0.40	0.40	0.40	0.40	0.40	2.16	20.42	2.56	12.82
ZAIN	0.470	0.21	0.21	0.21	0.21	0.21	1.77	11.37	7.45	2.03
BOUBYAN BANK	0.570	1.60	1.60	1.60	1.60	1.60	2.30	27.58	1.32	2.40
AGILITY	0.254	2.83	2.83	2.83	2.83	2.83	0.66	10.60	7.87	0.68
Saudi Arabia										
ARAMCO	28.05	0.00	0.00	0.00	0.00	0.00	4.56	16.55	6.87	6,788.46
SABIC	67.00	0.15	0.15	0.00	0.00	0.00	1.21	81.35	5.07	201.01
STC	40.60	-0.61	-0.61	1.50	1.50	1.50	2.55	15.94	3.94	203.01
AL-RAJHI BANK	97.30	-1.22	-1.22	2.85	2.85	2.85	3.30	22.24	2.47	389.22
NCB	33.10	-0.45	-0.45	-0.90	-0.90	-0.90	1.07	9.94	5.44	198.61
Abu Dhabi										
ETISALAT.AD	16.14	0.12	-1.82	-1.10	-1.10	-1.10	3.25	12.68	5.05	140.37
FAB.AD	13.40	-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	17.070	-1.27	-1.27	-1.27	-1.27	-1.27	1.41	10.37	3.84	157.62
INDUSTREIS QAT	13.140	-0.98	-0.98	-0.98	-0.98	-0.98	2.16	14.88	5.33	79.48
QA ISLAMIC BK	20.900	-2.15	-2.15	-2.15	-2.15	-2.15	1.63	11.49	2.93	49.37
MASRAF AL RAYA	2.462	-0.04	-0.04	-0.04	-0.04	-0.04	0.92	15.72	4.06	22.89
MESAIEED PETRO	1.492	-0.20	-0.20	-0.20	-0.20	-0.20	1.15	23.41	4.69	18.74
Oman										
BANK MUSCAT	0.254	0.40	0.40	0.79	0.79	0.79	0.79	9.47	6.10	1.90
OMANTEL	0.927	0.11	0.11	-1.38	-1.38	-1.38	1.10	10.97	6.47	0.69
BANK DHOFAR	0.156	0.00	0.00	0.00	0.00	0.00	0.64	17.49	4.97	0.47
NAT BANK OF OMAN	0.295	0.00	0.00	-0.34	-0.34	-0.34	0.68	10.06	2.88	0.48
OMINVEST	0.325	-1.22	-1.22	-1.52	-1.52	-1.52	0.69	7.38	6.15	0.22

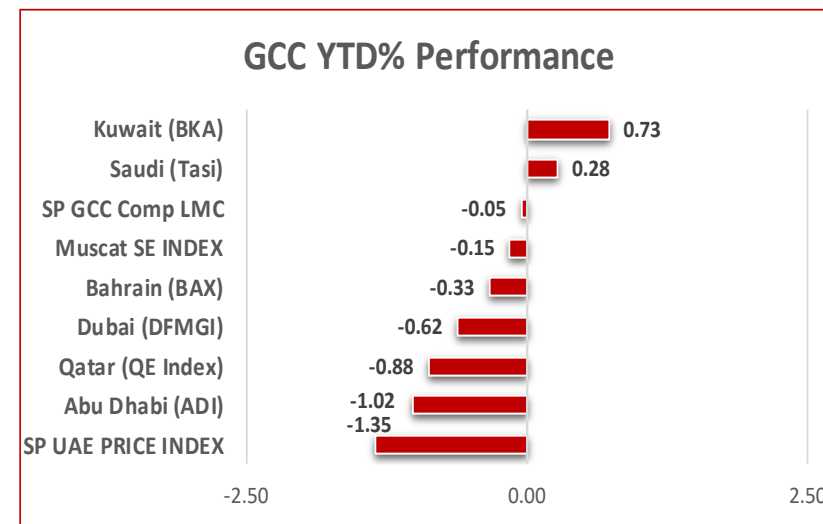
* GCC Markets performance at the latest close.

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 up today by 0.73%, the best performing sector today is consumer staples at 4.25%.

KSA

Saudi Armco had a flat performance today, SABIC have positive performance today at 0.15%, STC had a negative performance today at -0.61%, Al Rajhi Bank has a negative performance today at -1.22 %.

UAE

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



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