

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

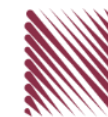
## GCC DAILY MORNING BRIEF

Tuesday, 7<sup>th</sup> January 2025



# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



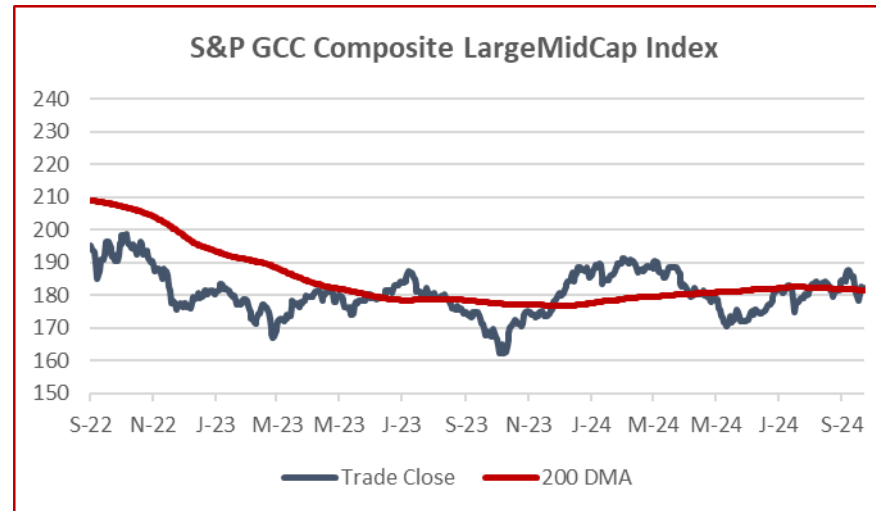
| * Market Watch     | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b> |             |       |       |       |       |       |      |       |                |                       |
| Saudi (Tasi)       | 12,104.7    | 0.29  | 0.02  | 0.57  | 0.57  | 0.57  | 2.41 | 20.44 | 3.32           | 10,185.22             |
| Qatar (QE Index)   | 10,485.7    | 0.07  | -0.81 | -0.81 | -0.81 | -0.81 | 1.23 | 11.64 | 4.27           | 531.41                |
| Dubai (DFMGI)      | 5,190.7     | 1.25  | 1.25  | 0.62  | 0.62  | 0.62  | 1.87 | 10.46 | 4.51           | 788.93                |
| Abu Dhabi (ADI)    | 9,428.4     | 1.13  | 1.13  | 0.10  | 0.10  | 0.10  | 2.73 | 16.65 | 2.08           | 2,712.06              |
| Bahrain (BAX)      | 1,977.4     | -0.10 | -0.10 | -0.43 | -0.43 | -0.43 | 0.91 | 9.47  | 4.57           | 7.53                  |
| Muscat SE INDEX    | 4,580.0     | 0.23  | 0.15  | 0.07  | 0.07  | 0.07  | 0.84 | 9.70  | 5.91           | 7.33                  |
| SP GCC Comp LMC    | 187.8       | 0.00  | -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 |      |       |                |                       |

|                          |         |       |       |       |       |       |      |       |      |            |
|--------------------------|---------|-------|-------|-------|-------|-------|------|-------|------|------------|
| <b>Developed Markets</b> |         |       |       |       |       |       |      |       |      |            |
| MSCI World Index         | 3,763.2 | 0.69  | 0.69  | 1.49  | 1.49  | 1.49  |      |       |      |            |
| U.S. (S&P 500)           | 5,975.4 | 0.55  | 0.55  | 1.59  | 1.59  | 1.59  | 4.93 | 28.05 | 1.53 | 53,130.28  |
| U.K. (FTSE 100)          | 8,249.7 | 0.31  | 0.31  | 0.94  | 0.94  | 0.94  | 1.68 | 15.76 | 3.71 | 2,135.90   |
| Japan (topix)            | 2,756.4 | -1.02 | -1.02 | -1.02 | -1.02 | -1.02 | 1.44 | 14.55 | 2.26 | 966,232.51 |

|                         |          |       |       |       |       |       |      |       |      |            |
|-------------------------|----------|-------|-------|-------|-------|-------|------|-------|------|------------|
| <b>Emerging Markets</b> |          |       |       |       |       |       |      |       |      |            |
| MSCI EM Index           | 1,078.9  | 0.53  | 0.53  | 0.32  | 0.32  | 0.32  |      |       |      |            |
| China (SSE Composite)   | 3,206.9  | -0.14 | -0.14 | -4.32 | -4.32 | -4.32 | 1.36 | 12.00 |      | 44,025.04  |
| India (Sensex)          | 77,965.0 | -1.59 | -1.59 | -0.22 | -0.22 | -0.22 | 4.21 | 22.67 | 1.19 | 153,092.17 |

| Description            | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>Kuwait</b>          |             |       |       |       |       |       |      |       |                |                       |
| Kuwait All Share Index | 7,430.3     | 0.19  | 0.92  | 0.92  | 0.92  | 0.92  | 1.53 | 15.64 | 3.59           | 44.67                 |
| Kuwait Premier Index   | 7,896.6     | 0.12  | 0.74  | 0.74  | 0.74  | 0.74  | 1.62 | 16.48 | 3.44           | 36.06                 |
| Kuwait Main Index      | 7,024.8     | 0.47  | 1.70  | 1.70  | 1.70  | 1.70  | 1.23 | 12.62 | 4.32           | 8.61                  |
| <b>Kuwait Sector</b>   |             |       |       |       |       |       |      |       |                |                       |
| Banking                | 1,823.7     | 0.22  | 0.77  | 0.77  | 0.77  | 0.77  | 1.81 | 17.63 | 3.01           | 27.27                 |
| Telecom                | 1,024.0     | 0.39  | 0.62  | 0.62  | 0.62  | 0.62  | 1.49 | 12.65 | 8.24           | 3.12                  |
| Industrials            | 728.6       | -0.18 | 0.68  | 0.68  | 0.68  | 0.68  | 0.82 | 11.83 | 6.06           | 2.47                  |
| Financial Services     | 1,520.4     | 0.26  | 0.65  | 0.65  | 0.65  | 0.65  | 1.24 | 12.68 | 2.74           | 5.06                  |
| Real Estate            | 1,374.8     | 0.49  | 1.60  | 1.60  | 1.60  | 1.60  | 1.05 | 15.45 | 2.08           | 2.90                  |
| Basic Materials        | 901.9       | -3.58 | -1.03 | -1.03 | -1.03 | -1.03 | 1.68 | 12.10 | 9.36           | 0.53                  |
| Health Care            | 441.8       | -3.59 | -3.59 | -3.59 | -3.59 | -3.59 | 1.53 | 14.77 | 2.29           |                       |
| Consumer Staples       | 1,040.5     | -0.07 | 4.19  | 4.19  | 4.19  | 4.19  | 2.26 | 21.22 | 1.97           | 0.32                  |
| Insurance              | 2,168.4     | 1.58  | 5.51  | 5.51  | 5.51  | 5.51  | 1.16 | 10.59 | 3.71           | 0.86                  |
| Consumer Discretionary | 2,186.2     | 0.19  | 2.98  | 2.98  | 2.98  | 2.98  |      |       |                |                       |
| Energy                 | 1,181.3     | -0.55 | -0.66 | -0.66 | -0.66 | -0.66 | 1.02 | 9.30  | 5.35           | 0.24                  |
| Technology             | 1,018.5     | -2.10 | -2.10 | -2.10 | -2.10 | -2.10 | 1.21 |       |                | 0.01                  |
| Utilities              | 392.1       | 0.68  | -1.32 | -1.32 | -1.32 | -1.32 |      |       |                |                       |

\* International and GCC Markets performance at the latest close.



### What Move the GCC markets

#### Oil Prices

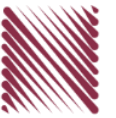
Oil prices extended losses into a second straight session on Tuesday on technical correction after last week's rally, while forecasts for ample supply and a firm dollar also weighed. Brent futures fell 28 cents, or 0.37%, to \$76.02 a barrel by 0148 GMT, while U.S. West Texas Intermediate (WTI) crude fell 33 cents, or 0.45%, to settle at \$73.23.

#### Kuwait Market

The market closed up by 0.19% at 7,430.3 value traded 63.6 million KD, Premier market value reached 43.7 million KD up by 0.12% at 7,896.6.

#### KSA Market

The market closed up by 0.29% at 12,104.7.



| * Description          | Close Price | DTD   | WTD   | MTD   | QTD   | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|-------|-------|-------|------|-------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |       |       |       |      |       |                |                       |
| <b>Kuwait</b>          |             |       |       |       |       |       |      |       |                |                       |
| NBK                    | 0.891       | -0.45 | -0.56 | -0.56 | -0.56 | -0.56 | 1.68 | 13.14 | 3.79           | 7.41                  |
| KFH                    | 0.750       | 0.13  | 0.54  | 0.54  | 0.54  | 0.54  | 2.16 | 20.45 | 2.56           | 12.81                 |
| ZAIN                   | 0.469       | -0.21 | 0.00  | 0.00  | 0.00  | 0.00  | 1.77 | 11.34 | 7.46           | 2.03                  |
| BOUBYAN BANK           | 0.579       | 1.58  | 3.21  | 3.21  | 3.21  | 3.21  | 2.34 | 28.01 | 1.30           | 2.43                  |
| AGILITY                | 0.258       | 1.57  | 4.45  | 4.45  | 4.45  | 4.45  | 0.67 | 10.77 | 7.75           | 0.69                  |
| <b>Saudi Arabia</b>    |             |       |       |       |       |       |      |       |                |                       |
| ARAMCO                 | 27.95       | -0.36 | -0.36 | -0.36 | -0.36 | -0.36 | 4.54 | 16.49 | 6.89           | 6,763.90              |
| SABIC                  | 66.40       | -0.90 | -0.75 | -0.90 | -0.90 | -0.90 | 1.20 | 80.62 | 5.12           | 199.20                |
| STC                    | 40.75       | 0.37  | -0.24 | 1.88  | 1.88  | 1.88  | 2.56 | 16.00 | 3.93           | 203.75                |
| AL-RAJHI BANK          | 97.60       | 0.31  | -0.91 | 3.17  | 3.17  | 3.17  | 3.31 | 22.31 | 2.46           | 390.40                |
| NCB                    | 33.45       | 1.06  | 0.60  | 0.15  | 0.15  | 0.15  | 1.09 | 10.04 | 5.38           | 200.70                |
| <b>Abu Dhabi</b>       |             |       |       |       |       |       |      |       |                |                       |
| ETISALAT.AD            | 16.30       | 0.99  | 0.99  | -0.12 | -0.12 | -0.12 | 3.28 | 12.80 | 5.00           | 141.75                |
| FAB.AD                 | 13.64       | 1.79  | 1.79  | -0.73 | -0.73 | -0.73 | 1.17 | 9.33  | 5.21           | 150.68                |
| EMIRATES NBD           | 21.50       | 4.88  | 4.88  | 0.23  | 0.23  | 0.23  | 1.10 | 6.03  | 5.58           | 135.80                |
| DB ISLAMIC DB          | 7.07        | 0.71  | 0.71  | -0.28 | -0.28 | -0.28 | 1.11 | 7.32  | 6.36           | 51.19                 |
| EMAR.DU                | 12.75       | 1.19  | 1.19  | -0.78 | -0.78 | -0.78 | 1.40 | 9.46  | 3.92           | 112.69                |
| <b>Qatar</b>           |             |       |       |       |       |       |      |       |                |                       |
| QNB                    | 17.140      | 0.41  | -0.87 | -0.87 | -0.87 | -0.87 | 1.42 | 10.42 | 3.82           | 158.36                |
| INDUSTREIS QAT         | 13.180      | 0.30  | -0.68 | -0.68 | -0.68 | -0.68 | 2.16 | 14.93 | 5.31           | 79.76                 |
| QA ISLAMIC BK          | 20.820      | -0.38 | -2.53 | -2.53 | -2.53 | -2.53 | 1.62 | 11.45 | 2.94           | 49.21                 |
| MASRAF AL RAYA         | 2.460       | -0.08 | -0.12 | -0.12 | -0.12 | -0.12 | 0.92 | 15.71 | 4.07           | 22.88                 |
| MESAIEED PETRO         | 1.490       | -0.13 | -0.33 | -0.33 | -0.33 | -0.33 | 1.15 | 23.38 | 4.70           | 18.72                 |
| <b>Oman</b>            |             |       |       |       |       |       |      |       |                |                       |
| BANK MUSCAT            | 0.256       | 0.79  | 1.19  | 1.59  | 1.59  | 1.59  | 0.80 | 9.55  | 6.05           | 1.93                  |
| OMANTEL                | 0.925       | -0.22 | -0.11 | -1.60 | -1.60 | -1.60 | 1.09 | 10.94 | 6.49           | 0.70                  |
| 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       | 0.00  | -1.22 | -1.52 | -1.52 | -1.52 | 0.69 | 7.38  | 6.15           | 0.22                  |

\* GCC Markets performance at the latest close.

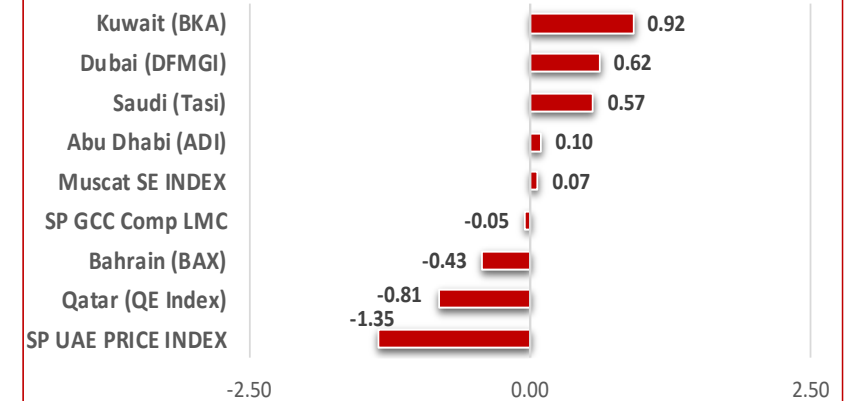
| Foreign Holding |        |        |       |       |       |        |        |         |       |
|-----------------|--------|--------|-------|-------|-------|--------|--------|---------|-------|
|                 | NBK    | GBK    | CBK   | ABK   | KIB   | BURG   | KFH    | BOUBYAN | WARBA |
| 25-Dec. 24      | 24.68% | 15.88% | 0.06% | 3.74% | 8.57% | 17.80% | 13.28% | 5.93%   | 6.09% |
| 01-Jan. 25      | 24.72% | 15.85% | 0.06% | 3.74% | 8.58% | 17.80% | 13.28% | 5.93%   | 6.09% |

### End of Report

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Sources, Bursa Kuwait , LSEG , NIC

### GCC YTD% Performance



\* GCC Markets performance at the latest close.

### Kuwait

The market is up today by 0.19%, the best performing sector today is insurance at 1.58%.

### KSA

Saudi Armco had a negative performance today at -0.36%, SABIC had a negative performance today at -0.90%, STC had a positive performance today at 0.37%, Al Rajhi Bank had a positive performance today at 0.31%.

### UAE

ETISALAT.AD has positive performance today by 0.99%, FAB.AD had a positive performance today at 1.79%.



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