



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

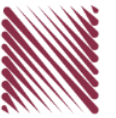
GCC DAILY MORNING BRIEF

Sunday, 9th February 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



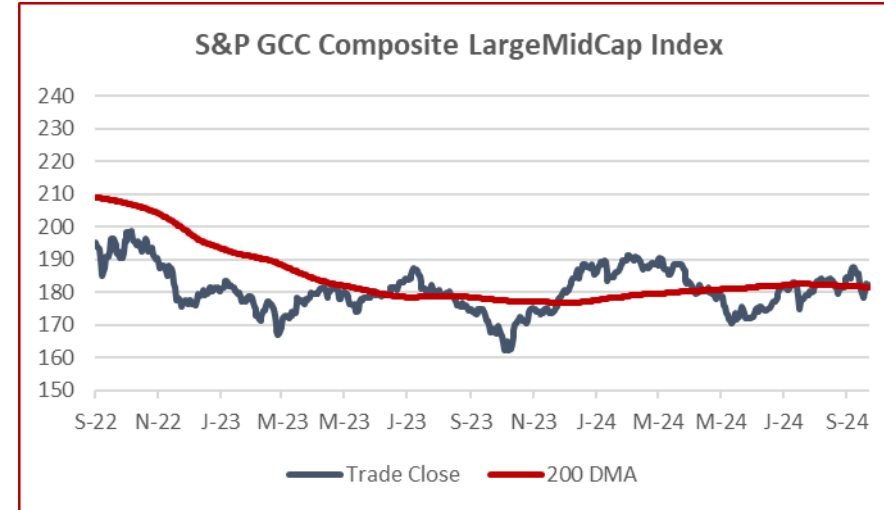
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,433.6	0.15	0.15	0.15	3.30	3.30	2.28	19.63	3.41	10,251.21
Qatar (QE Index)	10,615.8	-0.39	-0.48	-0.48	0.42	0.42	1.21	11.58	4.56	535.31
Dubai (DFMGI)	5,238.4	-0.12	1.12	1.12	1.55	1.55	1.80	10.47	4.47	788.31
Abu Dhabi (ADI)	9,586.1	0.24	0.00	0.00	1.77	1.77	2.68	16.90	2.15	2,741.53
Bahrain (BAX)	1,881.7	0.45	0.12	0.12	-5.25	-5.25	0.85	8.77	4.89	7.16
Muscat SE INDEX	4,564.3	-0.20	0.46	0.46	-0.27	-0.27	0.80	9.53	5.95	7.32
SP GCC Comp LMC	193.9	0.10	0.46	0.46	3.18	3.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.0	0.44	0.73	0.73	3.12	3.12				

Developed Markets										
MSCI World Index	3,832.8	-0.81	-0.10	-0.10	3.37	3.37				
U.S. (S&P 500)	6,026.0	-0.95	-0.24	-0.24	2.45	2.45	4.92	26.93	1.52	53,884.84
U.K. (FTSE 100)	8,700.5	-0.31	0.31	0.31	6.45	6.45	1.76	16.37	3.53	2,244.55
Japan (topix)	2,737.2	-0.54	-1.84	-1.84	-1.71	-1.71	1.43	13.81	2.28	954,543.69

Emerging Markets										
MSCI EM Index	1,108.5	0.57	1.38	1.38	3.07	3.07				
China (SSE Composite)	3,303.7	1.01	1.63	1.63	-1.43	-1.43	1.36	12.00		44,025.04
India (Sensex)	77,860.2	-0.25	0.46	0.46	-0.36	-0.36	4.21	21.95	1.15	153,141.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,895.4	-0.06	1.42	1.42	7.24	7.24	1.62	15.46	3.38	47.56
Kuwait Premier Index	8,423.1	-0.24	1.48	1.48	7.45	7.45	1.73	16.11	3.22	38.50
Kuwait Main Index	7,343.2	0.71	1.19	1.19	6.31	6.31	1.29	12.98	4.12	9.06
Kuwait Sector										
Banking	1,965.9	-0.41	1.23	1.23	8.63	8.63	1.95	16.88	2.79	29.46
Telecom	1,057.2	0.95	4.35	4.35	3.88	3.88	1.55	12.40	7.95	3.23
Industrials	746.0	-0.11	1.29	1.29	3.09	3.09	0.84	11.83	5.79	2.53
Financial Services	1,526.6	-0.18	-0.75	-0.75	1.06	1.06	1.25	12.79	2.74	5.10
Real Estate	1,521.5	0.34	1.25	1.25	12.45	12.45	1.14	17.45	1.87	3.23
Basic Materials	920.6	1.44	4.45	4.45	1.02	1.02	1.66	11.91	9.52	0.52
Health Care	448.4	0.00	-3.28	-3.28	-2.16	-2.16	1.50	14.46	2.34	
Consumer Staples	1,028.5	1.76	-0.30	-0.30	2.99	2.99	2.23	20.96	2.00	0.31
Insurance	2,103.0	0.49	3.00	3.00	2.32	2.32	1.15	10.43	3.77	0.85
Consumer Discretionary	2,420.9	2.58	6.02	6.02	14.04	14.04				
Energy	1,347.8	1.40	1.46	1.46	13.34	13.34	1.12	10.34	4.71	0.27
Technology	1,004.0	-2.13	-4.17	-4.17	-3.50	-3.50	1.16			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 finished with daily gains on Friday after new sanctions were imposed on Iran's crude exports but prices were down for the week as investors worried about U.S. President Donald Trump's renewed trade war on China and threats of tariffs on other countries. Brent crude futures settled at \$74.66 a barrel, up 37 cents, or 0.5% but fell nearly 3% this week. U.S. West Texas Intermediate crude finished at \$71.00 a barrel, up 39 cents, or 0.55%, but down about 2% this week.

Kuwait Market

The market closed down by -0.06% at 7,895.4 value traded 202.1 million KD, Premier market value reached 41.5 million KD, closed down by -0.24% at 8,423.1

KSA Market

The market closed up by 0.15% at 12,433.6

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	0.982	-0.91	1.87	1.87	9.60	9.60	1.80	14.14	3.44	8.18
KFH	0.794	-0.25	1.02	1.02	6.43	6.43	2.23	17.12	2.41	13.58
ZAIN	0.478	1.27	5.29	5.29	1.92	1.92	1.80	11.56	7.32	2.07
BOUBYAN BANK	0.640	0.00	1.91	1.91	14.08	14.08	2.53	29.62	1.18	2.69
AGILITY	0.256	-0.78	1.59	1.59	3.64	3.64	0.67	10.68	7.81	0.69
Saudi Arabia										
ARAMCO	27.65	-0.18	-0.54	-0.54	-1.43	-1.43	4.49	16.31	6.97	6,691.30
SABIC	67.90	0.89	1.34	1.34	1.34	1.34	1.23	82.44	5.01	203.70
STC	44.15	0.57	1.49	1.49	10.38	10.38	2.78	17.33	3.62	220.75
AL-RAJHI BANK	99.90	-1.28	0.91	0.91	5.60	5.60	3.39	22.83	2.40	399.60
NCB	34.35	-0.43	0.44	0.44	2.84	2.84	1.12	10.31	5.53	206.10
Abu Dhabi										
ETISALAT.AD	17.16	0.23	0.58	0.58	5.39	5.39	3.46	13.51	4.74	149.58
FAB.AD	14.16	-0.28	-2.89	-2.89	2.77	2.77	1.19	9.56	5.31	155.90
EMIRATES NBD	21.20	1.19	1.68	1.68	-1.17	-1.17	1.06	5.96	4.72	133.91
DB ISLAMIC DB	7.70	-1.16	0.00	0.00	8.60	8.60	1.21	7.98	5.84	55.75
EMAR.DU	13.65	0.37	1.11	1.11	6.23	6.23	1.50	10.13	3.66	120.65
Qatar										
QNB	16.600	-0.90	-0.60	-0.60	-3.99	-3.99	1.36	9.84	4.22	153.32
INDUSTREIS QAT	13.300	-0.08	-3.13	-3.13	0.23	0.23	2.13	17.92	5.56	80.47
QA ISLAMIC BK	20.830	0.05	1.12	1.12	-2.48	-2.48	1.58	11.22	3.84	49.22
MASRAF AL RAYA	2.378	-0.08	-0.42	-0.42	-3.45	-3.45	0.88	15.14	4.21	22.12
MESAIEED PETRO	1.492	-0.73	-2.48	-2.48	-0.20	-0.20	1.15	26.08	3.82	18.74
Oman										
BANK MUSCAT	0.258	0.39	0.78	0.78	2.38	2.38	0.79	9.59	6.01	1.94
OMANTEL	0.900	2.27	0.11	0.11	-4.26	-4.26	1.06	10.65	6.67	0.68
BANK DHOFAR	0.151	-4.43	0.00	0.00	-3.21	-3.21	0.61	13.71	5.30	0.45
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	0.335	-0.89	1.52	1.52	1.52	1.52	0.71	7.61	5.97	0.22

* GCC Markets performance at the latest close.

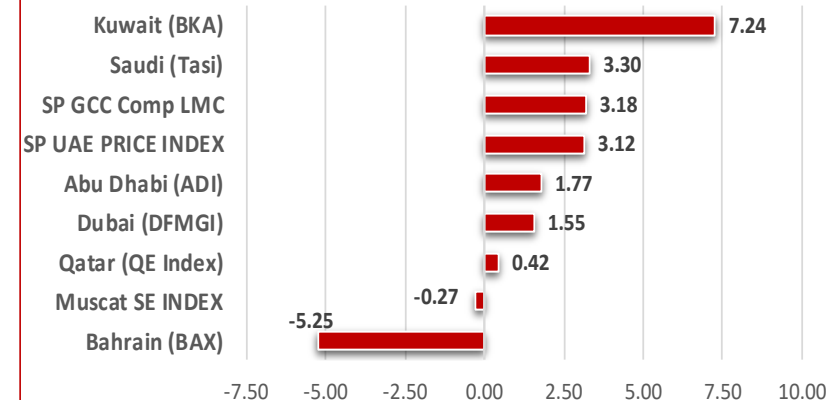
Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
29-Jan. 25	24.78%	15.04%	0.06%	3.86%	9.31%	17.92%	13.29%	6.39%	6.42%
5-Feb. 25	24.96%	15.38%	0.06%	3.97%	9.24%	17.97%	13.31%	6.41%	6.46%

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 down today by -0.06%, the best performing sector today is consumer discretionary at 2.58%.

KSA

Aramco had a negative performance today at -0.18%, Sabic had a positive performance today at 0.89%, STC had a positive performance at 0.57%, Al Rajhi Bank had a negative performance today at -1.28% .

UAE

ETISALAT.AD had a positive performance today at 0.23%, FAB.AD had a negative performance today at -0.28%.



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