



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 11th March 2025



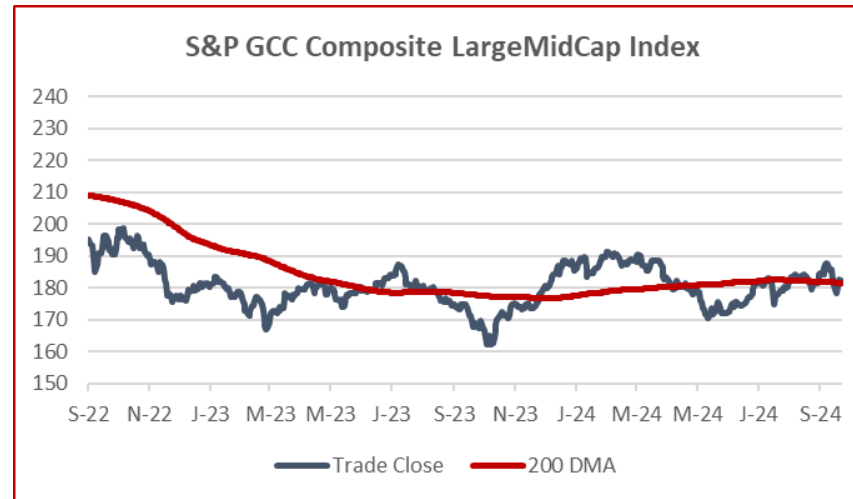


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,745.6	-0.77	-0.55	-3.02	-2.42	-2.42	2.13	17.76	3.53	9,688.74
Qatar (QE Index)	10,531.8	0.06	0.17	0.82	-0.37	-0.37	1.19	11.53	4.73	532.02
Dubai (DFMGI)	5,136.1	-1.66	-1.66	-3.41	-0.44	-0.44	1.65	9.77	5.46	765.82
Abu Dhabi (ADI)	9,392.6	-0.58	-0.58	-1.80	-0.28	-0.28	2.38	18.18	2.33	2,636.57
Bahrain (BAX)	1,971.7	-0.02	-0.11	0.59	-0.72	-0.72	0.88	8.90	5.00	7.50
Muscat SE INDEX	4,406.2	-0.32	0.24	-0.67	-3.72	-3.72	0.78	9.24	6.48	7.08
SP GCC Comp LMC	189.3	0.00	0.01	-1.33	0.75	0.75	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	153.1	0.00	0.00	-2.11	0.56	0.56				

Developed Markets										
MSCI World Index	3,651.5	-2.38	-2.38	-4.04	-1.52	-1.52				
U.S. (S&P 500)	5,614.6	-2.70	-2.70	-5.71	-4.54	-4.54	4.50	25.81	1.58	51,408.95
U.K. (FTSE 100)	8,600.2	-0.92	-0.92	-2.38	5.23	5.23	1.77	16.42	3.58	2,219.40
Japan (topix)	2,700.8	-0.29	-0.29	0.70	-3.02	-3.02	1.40	13.67	2.32	940,786.46
Emerging Markets										
MSCI EM Index	1,113.1	-1.37	-1.37	1.44	3.49	3.49				
China (SSE Composite)	3,366.2	-0.19	-0.19	1.36	0.43	0.43	1.36	12.00		44,025.04
India (Sensex)	74,115.2	-0.29	-0.29	1.25	-5.15	-5.15	4.01	20.89	1.21	145,443.20

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,067.4	0.32	-0.64	-0.42	9.57	9.57	1.64	15.02	3.45	48.46
Kuwait Premier Index	8,604.7	0.41	-0.68	-1.02	9.77	9.77	1.77	16.39	3.34	39.51
Kuwait Main Index	7,510.5	-0.12	-0.46	2.39	8.73	8.73	1.24	10.61	3.94	8.95
Kuwait Sector										
Banking	2,030.9	0.22	-0.82	0.09	12.22	12.22	1.98	16.30	2.92	30.37
Telecom	1,038.0	1.17	0.45	-2.89	1.99	1.99	1.54	10.84	8.19	3.14
Industrials	744.9	0.34	-1.02	-2.35	2.94	2.94	0.83	11.69	5.74	2.52
Financial Services	1,530.3	0.48	-0.95	-2.46	1.30	1.30	1.24	12.86	2.75	5.08
Real Estate	1,561.6	-0.14	-0.92	-0.06	15.41	15.41	1.17	17.75	1.87	3.33
Basic Materials	902.2	-0.72	-1.92	-3.19	-0.99	-0.99	1.63	11.19	9.64	0.51
Health Care	530.3	0.00	0.00	2.11	15.70	15.70	1.77	17.92	1.98	
Consumer Staples	1,002.1	-1.22	-2.53	-3.31	0.35	0.35	2.20	20.67	2.03	0.31
Insurance	2,099.8	0.01	-0.07	1.70	2.17	2.17	1.09	10.60	3.90	0.85
Consumer Discretionary	2,435.9	1.87	2.97	4.83	14.75	14.75				
Energy	1,326.3	-1.40	-1.27	-2.80	11.54	11.54	1.12	10.26	4.72	0.27
Technology	1,222.2	0.00	5.66	-24.32	17.48	17.48	1.42			0.02
Utilities	405.3	0.00	0.00	-0.64	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell for a second day in early trade on Tuesday on worries that U.S. tariffs on Canada, Mexico and China would slow economies around the world and hurt energy demand while OPEC+ ramps up its supply. Brent futures fell 29 cents, or 0.42%, to \$68.99 a barrel at 0016 GMT, while U.S. West Texas Intermediate crude futures lost 36 cents, or 0.55%, to \$65.67 a barrel.

Kuwait Market

The market closed up by 0.32% at 8,067.4 value traded 219.1 million KD, Premier market value reached 60.7 million KD, closed up by 0.41% at 8,604.7

KSA Market

The market closed down by -0.77% at 11,745.6

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	1.039	0.39	-0.29	0.87	15.96	15.96	1.90	14.96	3.37	8.65
KFH	0.797	0.50	-0.50	-0.50	6.84	6.84	2.23	17.18	2.76	13.63
ZAIN	0.471	1.51	0.43	-4.07	0.43	0.43	1.66	9.85	7.43	2.04
BOUBYAN BANK	0.649	-0.15	-2.84	-3.13	15.69	15.69	2.56	30.03	1.54	2.73
AGILITY	0.262	2.75	0.00	-4.03	6.07	6.07	0.68	10.93	7.63	0.70
Saudi Arabia										
ARAMCO	26.30	-1.31	0.19	-2.95	-6.24	-6.24	4.36	16.15	6.75	6,364.26
SABIC	62.60	0.16	0.16	0.97	-6.57	-6.57	1.20	89.60	5.43	187.79
STC	44.20	0.68	-0.90	-2.32	10.50	10.50	2.47	20.58	3.96	220.99
AL-RAJHI BANK	101.80	0.99	0.39	2.00	7.61	7.61	3.31	21.79	2.36	407.18
NCB	35.10	1.30	0.86	0.29	5.09	5.09	1.08	10.21	5.41	210.59
Abu Dhabi										
ETISALAT.AD	17.12	2.51	2.51	2.64	4.90	4.90	3.27	13.85	4.76	148.02
FAB.AD	14.26	-0.56	-0.56	0.14	3.78	3.78	1.20	9.65	5.26	157.23
EMIRATES NBD	21.05	1.20	1.20	-4.75	-1.86	-1.86	1.06	5.91	4.75	132.33
DB ISLAMIC DB	7.35	-1.34	-1.34	-4.92	3.67	3.67	1.07	7.07	6.12	52.71
EMAR.DU	13.15	-4.01	-4.01	-2.95	2.33	2.33	1.36	8.60	7.60	115.79
Qatar										
QNB	16.700	0.30	0.30	0.60	-3.41	-3.41	1.36	9.90	4.19	154.25
INDUSTREIS QAT	13.270	0.38	0.15	0.30	0.00	0.00	2.13	17.88	5.58	80.28
QA ISLAMIC BK	21.000	0.00	0.48	0.82	-1.69	-1.69	1.59	11.31	3.81	49.62
MASRAF AL RAYA	2.314	-0.22	-0.52	-0.26	-6.05	-6.05	0.86	14.73	4.32	21.52
MESAIEED PETRO	1.413	-0.56	0.28	-1.12	-5.48	-5.48	1.08	24.70	4.03	17.70
Oman										
BANK MUSCAT	0.255	-0.78	-0.78	0.39	1.19	1.19	0.78	9.48	6.47	1.91
OMANTEL	0.820	0.61	1.74	-0.24	-12.77	-12.77	0.97	9.70	6.71	0.61
BANK DHOFAR	0.151	0.00	0.00	0.00	-3.21	-3.21	0.61	13.71	4.34	0.45
NAT BANK OF OMAN	0.285	-0.35	1.79	1.79	-3.72	-3.72	0.60	9.21	3.30	0.46
OMINVEST	0.335	-0.30	0.00	0.30	1.52	1.52	0.71	7.61	5.97	0.22

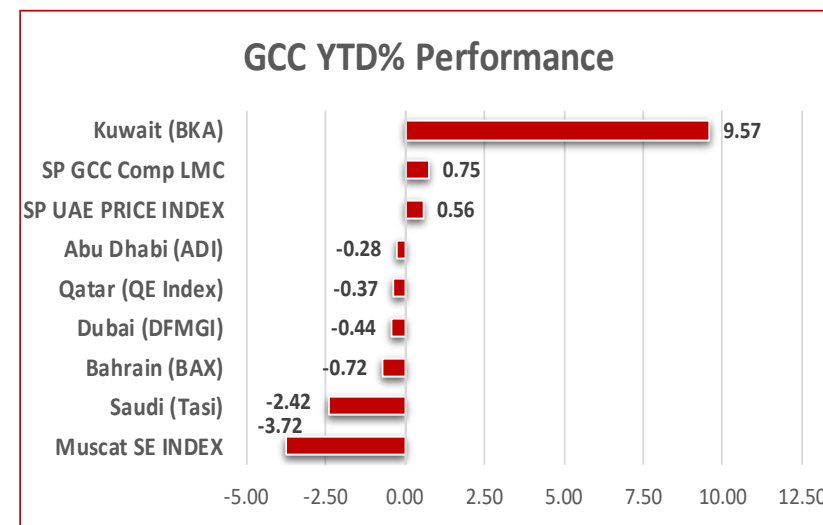
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
26-Feb. 25	25.36%	15.51%	0.06%	4.12%	9.26%	17.93%	13.51%	6.64%	6.95%
05-Mar. 25	25.41%	15.46%	0.06%	4.22%	8.79%	18.09%	13.51%	6.68%	6.98%

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 0.32%, the best performing sector today is consumer discretionary at 1.87%.

KSA

Aramco closed today down by -1.31%, Sabic closed at 0.16%, STC closed at 0.68% and Al Rajhi closed at 0.99%.

UAE

ETISALAT.AD had closed today at 2.51%, FAB.AD closed with a with a negative performance at -0.56%.



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