



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 11th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

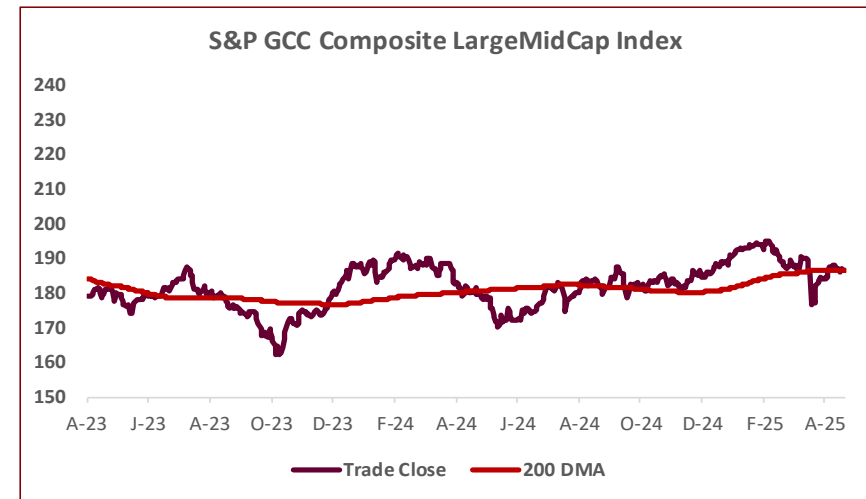


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,364.1	-0.30	-1.56	-2.63	-5.50	-5.59	2.07	15.66	3.82	9,293.05
Qatar (QE Index)	10,520.0	0.40	0.69	0.58	2.81	-0.48	1.20	11.49	4.69	530.58
Dubai (DFMGI)	5,312.6	-0.03	0.40	0.10	4.24	2.98	1.71	10.00	5.31	793.73
Abu Dhabi (ADI)	9,626.0	-0.08	0.49	0.96	2.74	2.20	2.03	14.66	3.02	2,697.05
Bahrain (BAX)	1,917.1	0.29	0.26	0.26	-1.75	-3.46	0.85	8.39	5.23	7.43
Muscat SE INDEX	4,351.8	-0.03	0.51	0.82	-0.35	-4.91	0.77	9.06	6.54	7.07
SP GCC Comp LMC	186.6	-0.03	-0.38	-0.85	-1.90	-0.70	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.4	-0.09	1.00	1.74	4.43	3.37				

Developed Markets										
MSCI World Index	3,711.7	0.10	-0.35	1.54	2.29	0.10				
U.S. (S&P 500)	5,659.9	-0.07	-0.47	1.63	0.86	-3.77	4.33	24.76	1.65	50,418.01
U.K. (FTSE 100)	8,554.8	0.27	-0.48	0.71	-0.33	4.67	1.80	16.23	3.57	2,224.45
Japan (topix)	2,733.5	1.29	1.70	2.48	2.81	-1.85	1.40	13.96	2.38	953,893.35
Emerging Markets										
MSCI EM Index	1,138.4	0.42	0.45	2.30	3.36	5.85				
China (SSE Composite)	3,342.0	-0.30	1.92	1.92	0.19	-0.29	1.36	12.00		44,025.04
India (Sensex)	79,454.5	-1.10	-1.30	-0.98	2.63	1.68	4.30	22.21	1.18	155,157.09

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,010.8	0.04	0.77	0.64	-0.78	8.80	1.63	15.11	3.49	48.68
Kuwait Premier Index	8,666.8	0.01	1.23	1.32	-0.09	10.56	1.81	16.60	3.32	40.43
Kuwait Main Index	6,967.8	0.21	-1.41	-2.62	-4.12	0.88	1.09	10.14	4.33	8.25
Kuwait Sector										
Banking	2,013.7	-0.10	0.60	0.45	-1.49	11.27	1.94	16.28	3.05	30.60
Telecom	1,034.8	-0.29	0.45	0.46	-1.44	1.68	1.55	10.67	7.33	3.16
Industrials	758.5	-0.02	1.89	0.80	1.81	4.82	1.13	14.43	4.99	2.57
Financial Services	1,492.1	0.57	0.88	0.87	-1.08	-1.23	1.16	12.68	3.28	4.98
Real Estate	1,599.3	-0.08	-0.30	0.52	5.42	18.19	1.12	18.24	1.84	3.40
Basic Materials	917.1	0.15	-0.01	0.71	2.02	0.64	1.63	11.23	9.94	0.52
Health Care	580.6	0.00	0.00	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,088.4	1.02	8.54	3.69	10.27	8.98	2.27	21.10	2.36	0.33
Insurance	1,813.1	1.60	0.77	0.16	-14.97	-11.78	0.92	8.81	3.49	0.73
Consumer Discretionary	2,415.0	0.65	4.25	4.09	2.30	13.76				
Energy	1,379.4	4.48	-0.37	-0.48	4.11	16.00	1.11	9.66	5.29	0.28
Technology	1,120.4	0.00	-1.28	-0.64	4.05	7.69	1.30			0.02
Utilities	384.2	-1.35	-1.35	-1.35	-5.19	-3.31				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged lower on Monday on concerns about a supply surplus next year and strengthened dollar, in thin trade ahead of the Christmas holiday. Brent crude futures were down by 0.4% to \$72.63 a barrel. U.S. West Texas Intermediate crude futures were slid 0.3% to \$69.24 per barrel.

Kuwait Market

The market closed up by 0.04% at 8,010.8 value traded 94.5 million KD, Premier market value reached 61.5 million KD, closed up by 0.01% at 8,666.8.

KSA Market

The market closed down by -0.30% at 11,364.1.

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	0.955	-0.10	0.00	0.32	-4.32	11.91	1.87	14.76	3.49	8.35
KFH	0.734	-0.27	1.24	1.52	-0.29	6.26	2.11	16.98	2.78	13.56
ZAIN	0.475	-0.63	0.64	0.42	-1.04	1.28	1.67	9.93	7.37	2.06
BOUBYAN BANK	0.678	0.00	-0.29	-0.15	3.78	26.90	2.87	32.82	1.40	2.99
AGILITY	0.262	-1.50	0.00	-0.38	3.97	6.07	0.66	10.52	3.82	0.70
Saudi Arabia										
ARAMCO	24.84	0.00	-1.43	-2.01	-7.14	-11.44	4.12	15.25	7.15	6,011.28
SABIC	58.80	-0.68	-4.08	-3.61	-7.69	-12.24	1.12	84.16	5.78	176.40
STC	45.50	-0.98	-3.19	-4.41	0.33	13.75	2.49	20.09	4.18	227.50
AL-RAJHI BANK	96.50	1.05	0.00	-0.92	-5.39	2.01	2.88	19.17	2.81	386.00
NCB	35.15	0.72	0.72	-1.54	-1.95	5.24	1.08	9.82	5.41	210.90
Abu Dhabi										
ETISALAT.AD	17.34	-0.35	-0.80	-0.69	2.25	5.88	2.95	10.91	4.80	150.28
FAB.AD	15.72	-0.76	2.63	3.86	12.88	13.54	1.35	9.95	4.81	172.34
EMIRATES NBD	21.05	-2.09	1.69	2.43	4.21	-1.86	1.05	6.05	4.75	132.96
DB ISLAMIC DB	7.55	0.00	0.00	-0.13	5.30	6.49	1.20	7.13	5.96	54.67
EMAR.DU	13.35	-0.74	-0.37	1.91	0.00	3.89	1.38	8.25	7.49	118.00
Qatar										
QNB	16.900	0.42	1.44	1.20	4.97	-2.26	1.37	9.93	4.14	156.10
INDUSTREIS QAT	12.000	0.00	-1.64	-4.46	-6.90	-9.57	2.01	17.27	6.17	72.60
QA ISLAMIC BK	21.390	0.66	0.66	1.33	3.99	0.14	1.64	11.42	3.74	50.54
MASRAF AL RAYA	2.280	-0.18	2.10	2.15	1.33	-7.43	0.86	14.50	4.39	21.20
MESAIEED PETRO	1.378	-0.58	-0.72	-2.27	-4.17	-7.83	1.07	24.35	4.14	17.31
Oman										
BANK MUSCAT	0.265	0.38	2.32	3.92	4.74	5.16	0.84	9.64	6.23	1.99
OMANTEL	0.814	-0.25	-0.25	-0.49	-4.24	-13.40	0.92	7.91	6.76	0.61
BANK DHOFAR	0.148	0.00	0.00	-0.67	3.55	-3.75	0.62	12.98	4.36	0.45
NAT BANK OF OMAN	0.295	0.00	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.220	0.00	2.33	1.38	-9.41	-6.67	0.64	7.57	6.49	0.21

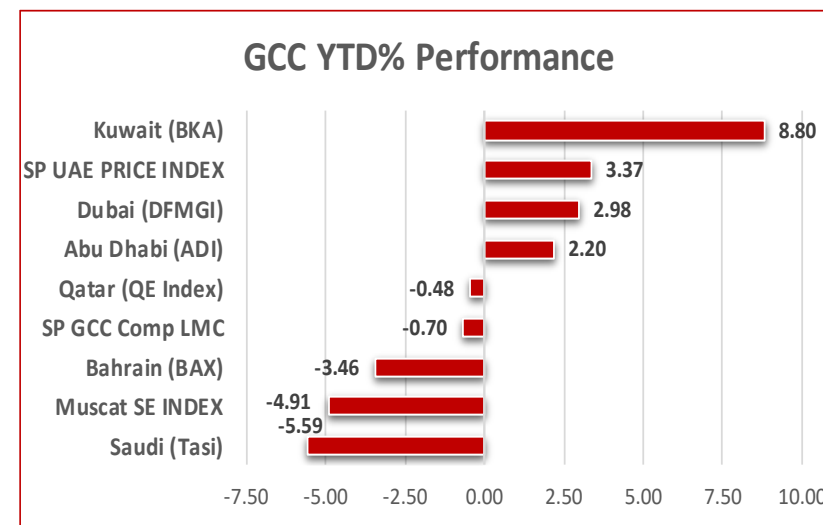
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
30-April. 25	26.30%	14.59%	0.06%	5.86%	8.98%	18.09%	13.71%	6.89%	7.96%
07-May. 25	26.53%	14.30%	0.07%	5.94%	8.94%	18.08%	13.74%	6.90%	7.16%

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 up 0.04%, the best performing sector today is energy at 4.48%.

KSA

Aramco closed flat at 0%, Sabic closed at -0.68%. STC closed at -0.98% and Al-Rajhi closed at 1.05%,

UAE

ETISALAT.AD closed at -0.35%, FAB.AD closed at -0.76%.



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