

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

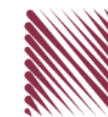
GCC DAILY MORNING BRIEF

Wednesday, 12th March 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

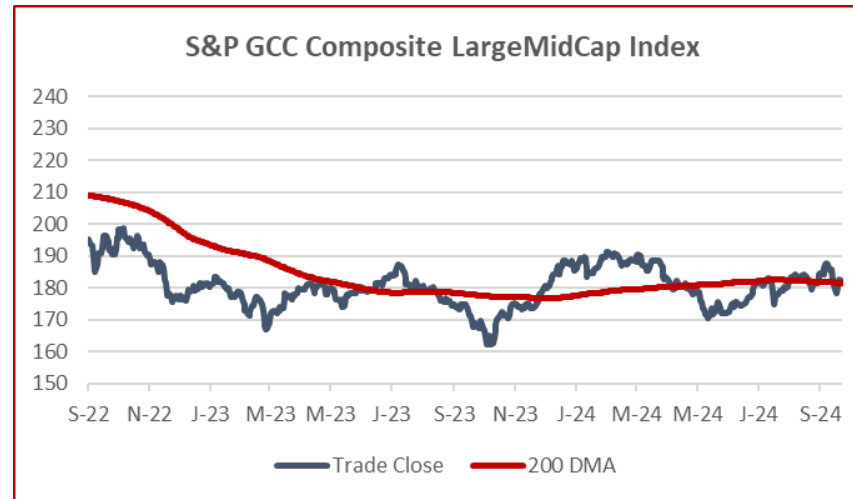


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,718.0	-0.24	-0.79	-3.25	-2.65	-2.65	2.12	17.67	3.56	9,688.99
Qatar (QE Index)	10,484.5	-0.45	-0.28	0.37	-0.82	-0.82	1.18	11.47	4.76	528.93
Dubai (DFMGI)	5,121.8	-0.28	-1.93	-3.68	-0.71	-0.71	1.65	9.76	5.47	762.96
Abu Dhabi (ADI)	9,376.5	-0.17	-0.75	-1.97	-0.45	-0.45	2.37	18.14	2.33	2,627.90
Bahrain (BAX)	1,962.7	-0.46	-0.57	0.12	-1.17	-1.17	0.87	8.85	5.03	7.47
Muscat SE INDEX	4,405.4	-0.02	0.23	-0.69	-3.74	-3.74	0.78	9.21	6.49	7.07
SP GCC Comp LMC	188.4	0.00	-0.43	-1.77	0.30	0.30	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.9	0.00	-1.46	-3.54	-0.91	-0.91				

Developed Markets										
MSCI World Index	3,623.2	-0.78	-3.13	-4.79	-2.28	-2.28				
U.S. (S&P 500)	5,572.1	-0.76	-3.43	-6.42	-5.26	-5.26	4.37	25.11	1.62	49,995.14
U.K. (FTSE 100)	8,496.0	-1.21	-2.12	-3.56	3.95	3.95	1.75	16.22	3.63	2,192.20
Japan (topix)	2,670.7	-1.11	-1.40	-0.42	-4.10	-4.10	1.39	13.52	2.35	930,730.67
Emerging Markets										
MSCI EM Index	1,109.2	-0.35	-1.72	1.09	3.13	3.13				
China (SSE Composite)	3,379.8	0.41	0.22	1.77	0.84	0.84	1.36	12.00		44,025.04
India (Sensex)	74,102.3	-0.02	-0.31	1.24	-5.17	-5.17	4.01	20.89	1.21	145,494.98

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,996.9	-0.87	-1.51	-1.29	8.62	8.62	1.65	15.18	3.44	48.60
Kuwait Premier Index	8,525.3	-0.92	-1.60	-1.93	8.76	8.76	1.78	16.46	3.33	39.67
Kuwait Main Index	7,461.4	-0.65	-1.11	1.72	8.02	8.02	1.25	10.94	3.94	8.93
Kuwait Sector										
Banking	2,014.9	-0.79	-1.60	-0.70	11.33	11.33	1.99	16.34	2.91	30.43
Telecom	1,025.7	-1.18	-0.73	-4.04	0.78	0.78	1.56	10.96	8.10	3.17
Industrials	736.2	-1.17	-2.18	-3.49	1.74	1.74	0.85	13.27	5.72	2.52
Financial Services	1,521.6	-0.56	-1.51	-3.00	0.73	0.73	1.25	12.92	2.74	5.11
Real Estate	1,532.0	-1.89	-2.79	-1.95	13.22	13.22	1.17	17.68	1.87	3.33
Basic Materials	878.5	-2.63	-4.49	-5.73	-3.59	-3.59	1.62	11.11	9.71	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	0.00	-2.53	-3.31	0.35	0.35	2.18	20.42	2.05	0.30
Insurance	2,104.2	0.21	0.14	1.91	2.38	2.38	1.09	10.60	3.90	0.85
Consumer Discretionary	2,414.5	-0.88	2.07	3.91	13.74	13.74				
Energy	1,332.5	0.46	-0.82	-2.35	12.05	12.05	1.10	10.21	4.79	0.27
Technology	1,200.4	-1.79	3.77	-25.68	15.38	15.38	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 edged up early on Wednesday, helped by a weaker dollar, but mounting fears of a U.S. economic slowdown and the impact of tariffs on global economic growth capped gains. Brent futures rose 27 cents, or 0.39%, to \$69.83 a barrel at 0110 GMT, while U.S. West Texas Intermediate crude futures gained 29 cents, or 0.44%, to \$66.54 a barrel.

Kuwait Market

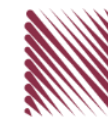
The market closed down by -0.87% at 7,996.9 value traded 118.5 million KD, Premier market value reached 45.2 million KD, closed down by -0.92% at 8,525.3

KSA Market

The market closed down by -0.24% at 11,718.0

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	1.030	-0.87	-1.15	0.00	14.96	14.96	1.88	14.83	3.40	8.57
KFH	0.790	-0.88	-1.37	-1.37	5.90	5.90	2.22	17.03	2.78	13.51
ZAIN	0.464	-1.49	-1.07	-5.50	-1.07	-1.07	1.64	9.70	7.54	2.01
BOUBYAN BANK	0.649	0.00	-2.84	-3.13	15.69	15.69	2.56	30.03	1.54	2.72
AGILITY	0.258	-1.53	-1.53	-5.49	4.45	4.45	0.67	10.77	7.75	0.69
Saudi Arabia										
ARAMCO	26.30	0.00	0.19	-2.95	-6.24	-6.24	4.36	16.15	6.75	6,362.73
SABIC	62.90	0.48	0.64	1.45	-6.12	-6.12	1.20	90.03	5.41	188.64
STC	44.20	0.00	-0.90	-2.32	10.50	10.50	2.47	20.58	3.96	220.94
AL-RAJHI BANK	100.20	-1.57	-1.18	0.40	5.92	5.92	3.26	21.45	2.40	400.68
NCB	34.65	-1.28	-0.43	-1.00	3.74	3.74	1.07	10.08	5.48	207.84
Abu Dhabi										
ETISALAT.AD	17.50	2.22	4.79	4.92	7.23	7.23	3.34	14.15	4.66	152.19
FAB.AD	14.24	-0.14	-0.70	0.00	3.64	3.64	1.20	9.64	5.27	157.23
EMIRATES NBD	20.60	-2.14	-0.96	-6.79	-3.96	-3.96	1.03	5.79	4.85	130.12
DB ISLAMIC DB	7.34	-0.14	-1.48	-5.05	3.53	3.53	1.06	7.06	6.13	52.64
EMAR.DU	12.95	-1.52	-5.47	-4.43	0.78	0.78	1.34	8.47	7.72	114.46
Qatar										
QNB	16.530	-1.02	-0.72	-0.42	-4.40	-4.40	1.35	9.80	4.23	152.35
INDUSTREIS QAT	13.270	0.00	0.15	0.30	0.00	0.00	2.13	17.88	5.58	80.11
QA ISLAMIC BK	21.080	0.38	0.86	1.20	-1.31	-1.31	1.60	11.35	3.80	49.83
MASRAF AL RAYA	2.318	0.17	-0.34	-0.09	-5.89	-5.89	0.86	14.75	4.31	21.56
MESAIEED PETRO	1.405	-0.57	-0.28	-1.68	-6.02	-6.02	1.08	24.56	4.06	17.66
Oman										
BANK MUSCAT	0.254	-0.39	-1.17	0.00	0.79	0.79	0.78	9.44	6.50	1.91
OMANTEL	0.813	-0.85	0.87	-1.09	-13.51	-13.51	0.96	9.62	6.77	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	0.290	1.75	3.57	3.57	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.334	-0.30	-0.30	0.00	1.21	1.21	0.71	7.59	5.99	0.22

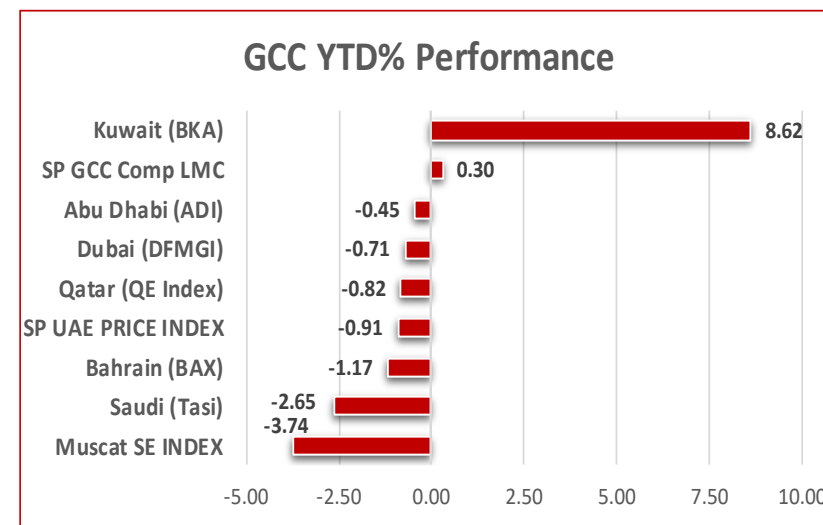
* GCC Markets performance at the latest close.

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



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Kuwait

The market is down today by -0.87%, the worst performing sector today is basic materials at -2.63%.

KSA

Aramco closed today flat, Sabic closed at 0.48%, STC closed flat, and Al Rajhi closed at down at -1.57%.

UAE

ETISALAT.AD had closed today at 2.22%, FAB.AD closed with a with a negative performance at -0.14%.



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