

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

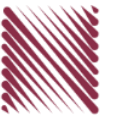
GCC DAILY MORNING BRIEF

Monday, 12th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

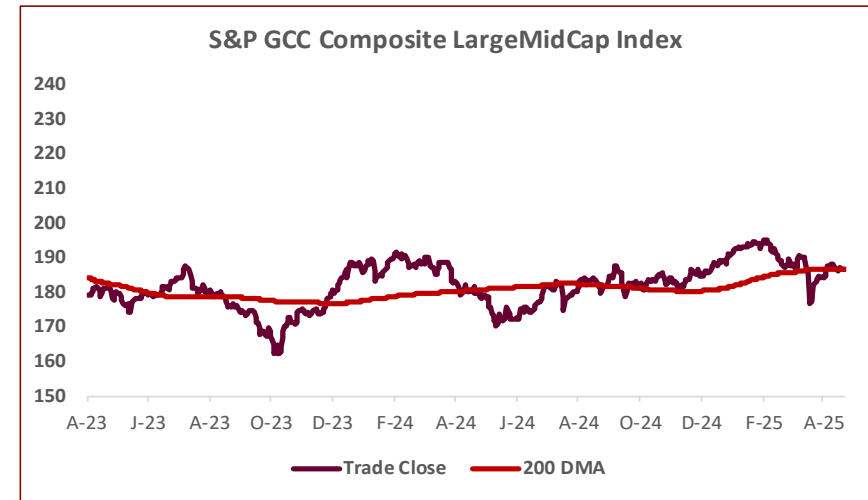


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,346.6	-0.15	-0.15	-2.78	-5.64	-5.73	2.06	15.62	3.76	9,324.27
Qatar (QE Index)	10,532.3	0.12	0.12	0.69	2.92	-0.37	1.20	11.50	4.69	530.53
Dubai (DFMGI)	5,312.6	-0.03	0.40	0.10	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)	1,919.9	0.15	0.15	0.40	-1.61	-3.32	0.85	8.40	5.22	7.45
Muscat SE INDEX	4,355.2	0.08	0.08	0.90	-0.27	-4.84	0.77	9.08	6.53	7.08
SP GCC Comp LMC	186.5	-0.05	-0.05	-0.91	-1.96	-0.76	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.4	0.00	0.00	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	2,224.44
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	8,055.9	0.56	0.56	1.21	-0.22	9.42	1.63	15.11	3.49	48.68
Kuwait Premier Index	8,722.9	0.65	0.65	1.98	0.56	11.28	1.81	16.60	3.32	40.43
Kuwait Main Index	6,978.1	0.15	0.15	-2.47	-3.98	1.03	1.09	10.14	4.33	8.25
Kuwait Sector										
Banking	2,028.3	0.72	0.72	1.18	-0.77	12.07	1.94	16.28	3.05	30.60
Telecom	1,037.9	0.30	0.30	0.76	-1.14	1.98	1.55	10.67	7.33	3.16
Industrials	756.8	-0.23	-0.23	0.57	1.58	4.58	1.13	14.43	4.99	2.57
Financial Services	1,496.0	0.26	0.26	1.13	-0.82	-0.97	1.16	12.68	3.28	4.98
Real Estate	1,612.0	0.80	0.80	1.32	6.26	19.14	1.12	18.24	1.84	3.40
Basic Materials	896.2	-2.27	-2.27	-1.57	-0.29	-1.65	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	1,095.2	0.63	0.63	4.34	10.96	9.67	2.27	21.10	2.36	0.33
Insurance	1,830.7	0.97	0.97	1.13	-14.14	-10.93	0.92	8.81	3.49	0.73
Consumer Discretionary	2,429.9	0.62	0.62	4.74	2.94	14.47				
Energy	1,388.3	0.64	0.64	0.16	4.78	16.74	1.11	9.66	5.29	0.28
Technology	1,113.1	-0.65	-0.65	-1.29	3.38	6.99	1.30			0.02
Utilities	384.2	0.00	0.00	-1.35	-5.19	-3.31				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

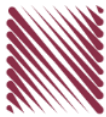
Oil prices rose on Friday, posting a weekly gain as trade tensions between top oil consumers China and the United States showed signs of easing and Britain announced a “breakthrough” U.S. trade deal. Brent crude rose \$1.07, or 1.7%, to \$63.91 a barrel.

Kuwait Market

The market closed up by 0.56% at 8,055.9 value traded 92.9 million KD, Premier market value reached 64.1 million KD, closed up by 0.65% at 8,722.9.

KSA Market

The market closed down by -0.15% at 11,346.6.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.959	0.42	0.42	0.74	-3.92	12.38	1.88	14.82	3.48	8.39
KFH	0.742	1.09	1.09	2.63	0.80	7.42	2.13	17.16	2.75	13.72
ZAIN	0.478	0.63	0.63	1.06	-0.42	1.92	1.68	9.99	7.32	2.07
BOUBYAN BANK	0.678	0.00	0.00	-0.15	3.78	26.90	2.87	32.82	1.40	2.99
AGILITY	0.260	-0.76	-0.76	-1.14	3.17	5.26	0.65	10.44	3.85	0.70
Saudi Arabia										
ARAMCO	25.00	0.64	0.64	-1.38	-6.54	-10.87	4.15	15.35	6.50	6,050.00
SABIC	58.70	-0.17	-0.17	-3.77	-7.85	-12.39	1.12	84.02	5.79	176.10
STC	45.85	0.77	0.77	-3.68	1.10	14.63	2.51	20.24	4.14	229.25
AL-RAJHI BANK	96.00	-0.52	-0.52	-1.44	-5.88	1.48	2.87	19.07	2.82	384.00
NCB	35.00	-0.43	-0.43	-1.96	-2.37	4.79	1.08	9.78	5.43	210.00
Abu Dhabi										
ETISALAT.AD	17.28	-0.35	-0.80	-0.69	2.25	5.88	2.95	10.91	4.80	150.28
FAB.AD	15.60	-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	16.860	-0.24	-0.24	0.96	4.72	-2.49	1.37	9.91	4.15	156.20
INDUSTREIS QAT	12.050	0.42	0.42	-4.06	-6.52	-9.19	2.02	17.35	6.14	73.13
QA ISLAMIC BK	21.590	0.94	0.94	2.27	4.96	1.08	1.65	11.53	3.71	51.17
MASRAF AL RAYA	2.262	-0.79	-0.79	1.34	0.53	-8.16	0.86	14.38	4.42	21.10
MESAIEED PETRO	1.379	0.07	0.07	-2.20	-4.10	-7.76	1.07	24.37	4.13	17.38
Oman										
BANK MUSCAT	0.266	0.38	0.38	4.31	5.14	5.56	0.84	9.68	6.20	1.99
OMANTEL	0.817	0.37	0.37	-0.12	-3.88	-13.09	0.92	7.94	6.73	0.61
BANK DHOFAR	0.147	-0.68	-0.68	-1.34	2.85	-4.40	0.61	12.89	4.39	0.45
NAT BANK OF OMAN	0.290	-1.69	-1.69	-1.69	0.00	-2.03	0.61	9.07	3.24	0.47
OMINVEST	0.221	0.45	0.45	1.84	-9.00	-6.24	0.64	7.61	6.46	0.21

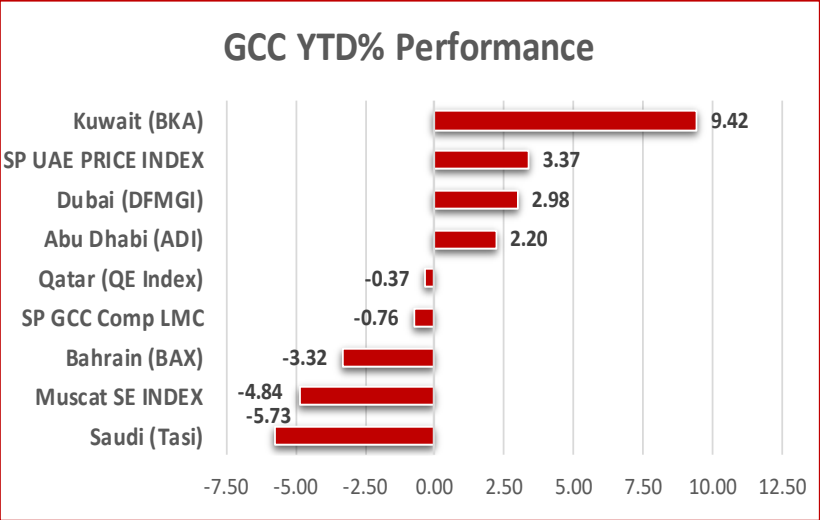
* GCC Markets performance at the latest close.

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 0.56%, the best performing sector today is Insurance at 0.97%.

KSA

Aramco closed at 0.64%, Sabic closed at -0.17%. STC closed at 0.77% and Al-Rajhi closed at -0.52%.

UAE

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



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw