

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

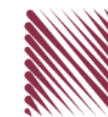
GCC DAILY MORNING BRIEF

Sunday, 13th April 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

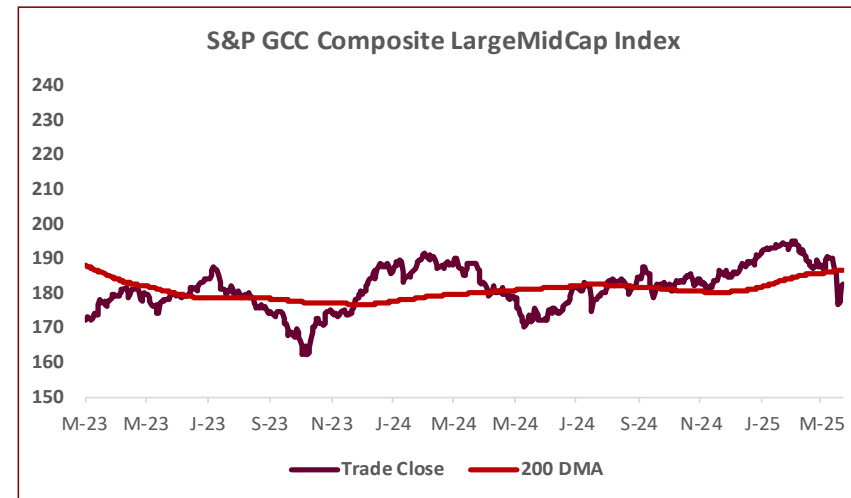


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,502.5	3.66	-3.20	-4.35	-4.35	-4.44	2.08	16.14	3.74	9,581.36
Qatar (QE Index)	10,095.1	1.93	-1.35	-1.35	-1.35	-4.50	1.14	10.96	4.90	507.46
Dubai (DFMGI)	4,966.0	-0.16	0.29	-2.56	-2.56	-3.73	1.60	9.48	5.67	736.66
Abu Dhabi (ADI)	9,157.9	0.36	-0.32	-2.25	-2.25	-2.77	1.90	14.35	3.24	2,579.27
Bahrain (BAX)	1,901.8	0.29	-1.90	-2.54	-2.54	-4.24	0.85	8.55	5.21	7.39
Muscat SE INDEX	4,270.4	0.70	-2.21	-2.21	-2.21	-6.69	0.76	8.85	6.68	6.94
SP GCC Comp LMC	182.5	0.10	-2.10	-4.02	-4.02	-2.85	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	143.8	0.43	0.78	-4.60	-4.60	-5.57				

Developed Markets										
MSCI World Index	3,471.3	1.44	4.36	-4.34	-4.34	-6.38				
U.S. (S&P 500)	5,363.4	1.81	5.70	-4.43	-4.43	-8.81	4.17	23.99	1.72	47,848.06
U.K. (FTSE 100)	7,964.2	0.64	-1.13	-7.21	-7.21	-2.56	1.66	15.23	3.85	2,074.85
Japan (topix)	2,466.9	-2.85	-0.61	-7.21	-7.21	-11.42	1.28	12.50	2.55	861,069.81
Emerging Markets										
MSCI EM Index	1,045.2	1.59	-3.90	-5.10	-5.10	-2.81				
China (SSE Composite)	3,238.2	0.45	-3.11	-2.92	-2.92	-3.39	1.36	12.00		44,025.04
India (Sensex)	75,157.3	1.77	-0.28	-2.92	-2.92	-3.82	4.07	21.18	1.19	147,057.67

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,819.9	1.55	-2.26	-3.15	-3.15	6.21	1.63	14.78	3.57	47.54
Kuwait Premier Index	8,378.4	1.63	-2.52	-3.42	-3.42	6.88	1.79	16.07	3.43	39.07
Kuwait Main Index	7,129.8	1.21	-1.06	-1.90	-1.90	3.22	1.14	10.46	4.24	8.47
Kuwait Sector										
Banking	1,981.4	1.89	-2.28	-3.07	-3.07	9.48	1.97	16.02	3.09	30.14
Telecom	1,037.7	0.62	-0.17	-1.16	-1.16	1.96	1.56	10.96	7.31	3.17
Industrials	725.2	1.43	-0.50	-2.66	-2.66	0.22	1.07	13.00	5.91	2.45
Financial Services	1,433.7	1.47	-3.89	-4.95	-4.95	-5.09	1.11	12.27	3.10	4.79
Real Estate	1,482.8	0.55	-2.04	-2.26	-2.26	9.58	1.03	16.90	1.95	3.14
Basic Materials	882.0	2.00	-3.18	-1.88	-1.88	-3.21	1.57	10.80	9.93	0.50
Health Care	570.6	0.00	0.00	0.00	0.00	24.50	1.96	22.49	1.84	
Consumer Staples	905.1	-0.14	-0.94	-8.30	-8.30	-9.37	1.89	17.37	2.84	0.27
Insurance	2,052.5	0.50	-1.58	-3.74	-3.74	-0.13	1.04	10.01	3.57	0.83
Consumer Discretionary	2,237.6	1.01	-4.66	-5.21	-5.21	5.41				
Energy	1,286.4	0.35	-3.60	-2.91	-2.91	8.18	1.04	9.12	5.67	0.26
Technology	1,054.9	0.69	-8.23	-2.03	-2.03	1.40	1.23			0.01
Utilities	386.8	0.00	-2.65	-4.55	-4.55	-2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Brent and West Texas Intermediate crude climbed more than \$1 on Friday after U.S. Energy Secretary Chris Wright said the United States could end Iran's oil exports as part of an effort to bring the Islamic Republic to terms over its nuclear program. Brent crude futures settled at \$64.76 a barrel, up \$1.43, or 2.26%. U.S. West Texas Intermediate crude finished at \$61.50 a barrel, up \$1.43 or 2.38%.

Kuwait Market

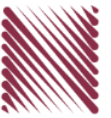
The market closed up by 1.55% at 7,819.9 value traded 118.8 million KD, Premier market value reached 88 million KD, closed up by 1.63% at 8,378.4.

KSA Market

The market closed up by 3.66% at 11,502.5.

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	0.949	2.37	-4.83	-4.92	-4.92	11.21	1.82	14.35	3.51	8.30
KFH	0.719	1.27	-1.46	-2.32	-2.32	4.09	2.18	16.74	2.83	13.29
ZAIN	0.469	1.08	-0.85	-2.29	-2.29	0.00	1.65	9.80	7.46	2.03
BOUBYAN BANK	0.627	2.62	-2.47	-4.03	-4.03	17.35	2.48	29.01	1.52	2.77
AGILITY	0.237	2.16	-4.05	-5.95	-5.95	-4.05	0.59	9.52	8.44	0.63
Saudi Arabia										
ARAMCO	26.00	2.56	-1.14	-2.80	-2.80	-7.31	4.31	15.97	6.83	6,292.00
SABIC	60.60	0.83	-3.66	-4.87	-4.87	-9.55	1.16	86.74	5.61	181.80
STC	45.55	1.90	-0.98	0.44	0.44	13.88	2.54	21.20	3.84	227.75
AL-RAJHI BANK	97.60	3.17	-2.98	-4.31	-4.31	3.17	3.17	20.89	2.78	390.40
NCB	33.70	5.48	-4.26	-6.00	-6.00	0.90	1.04	9.81	5.64	202.20
Abu Dhabi										
ETISALAT.AD	16.20	2.96	-0.60	-1.30	-1.30	2.21	3.18	13.49	4.98	145.06
FAB.AD	13.40	-1.04	4.41	-4.05	-4.05	-3.49	1.12	8.98	5.66	146.41
EMIRATES NBD	19.25	0.52	0.52	-4.70	-4.70	-10.26	0.97	5.41	5.19	121.59
DB ISLAMIC DB	7.22	0.14	0.28	0.70	0.70	1.83	1.05	6.95	6.23	52.28
EMAR.DU	12.05	0.00	1.69	-9.74	-9.74	-6.23	1.25	7.88	8.30	106.51
Qatar										
QNB	15.740	3.21	-2.24	-2.24	-2.24	-8.96	1.29	9.33	4.45	145.38
INDUSTREIS QAT	12.440	2.56	-3.49	-3.49	-3.49	-6.25	1.99	16.76	5.95	75.26
QA ISLAMIC BK	20.400	2.26	-0.83	-0.83	-0.83	-4.49	1.55	10.99	3.92	48.20
MASRAF AL RAYA	2.204	1.94	-2.04	-2.04	-2.04	-10.52	0.82	14.03	4.54	20.50
MESAIEED PETRO	1.388	2.81	-3.48	-3.48	-3.48	-7.16	1.07	24.26	4.11	17.44
Oman										
BANK MUSCAT	0.25	-0.40	-1.19	-1.19	-1.19	-0.79	0.77	9.29	6.60	1.88
OMANTEL	0.811	0.62	-4.59	-4.59	-4.59	-13.72	0.91	7.88	6.78	0.61
BANK DHOFAR	0.144	2.86	0.75	0.75	0.75	-6.35	0.58	13.15	4.48	0.44
NAT BANK OF OMAN	0.280	0.00	-3.45	-3.45	-3.45	-5.41	0.59	9.04	3.36	0.46
OMINVEST	0.225	3.69	-7.35	-7.35	-7.35	-4.55	0.65	7.75	6.35	0.21

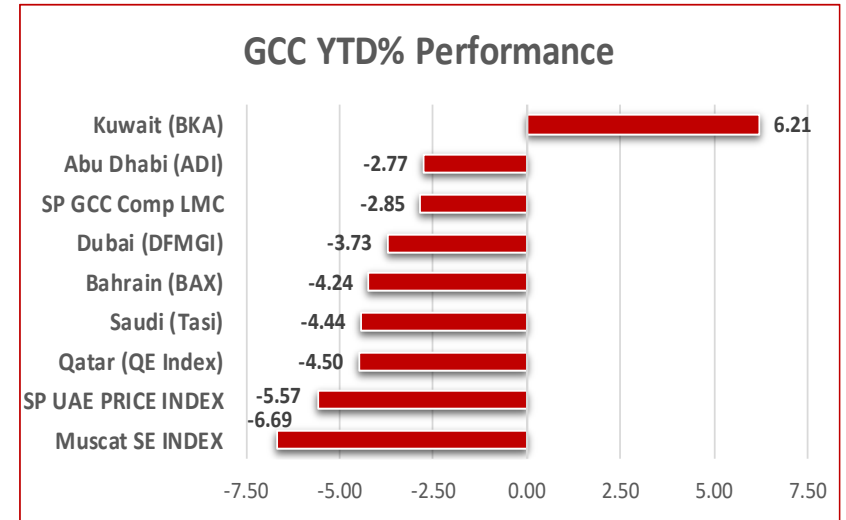
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
02-April. 25	25.97%	15.64%	0.06%	5.62%	9.48%	18.11%	13.65%	6.87%	7.30%
09-April. 25	26.05%	15.12%	0.06%	5.76%	9.60%	18.13%	13.63%	6.84%	7.55%

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 1.55%, the best performing sector today is basic materials at 2.0%.

KSA

Aramco closed at 2.56%, Sabic closed at 0.83%, STC closed at 1.90% and Al-Rajhi closed at 3.17%.

UAE

ETISALAT.AD had closed today at 2.96%, FAB.AD closed at -1.04%.



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