

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

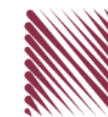
GCC DAILY MORNING BRIEF

Thursday, 13th March 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

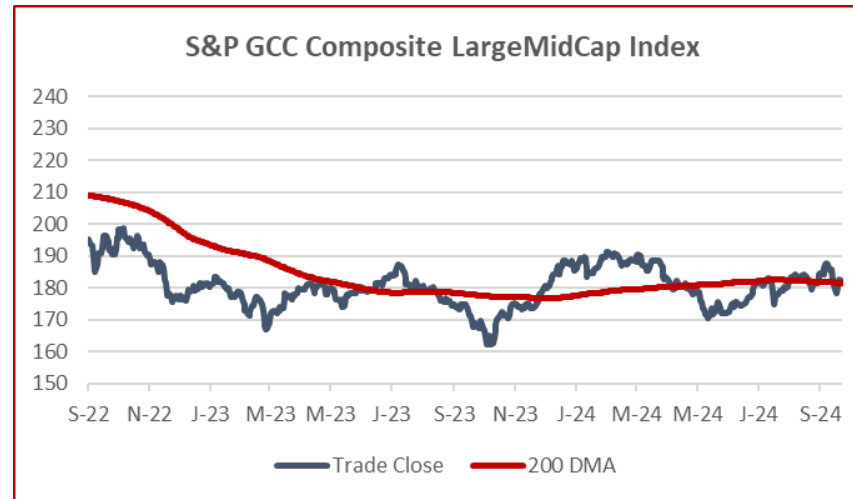


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,704.9	-0.11	-0.90	-3.36	-2.75	-2.75	2.12	17.62	3.56	9,655.30
Qatar (QE Index)	10,438.0	-0.44	-0.72	-0.07	-1.26	-1.26	1.18	11.37	4.74	525.72
Dubai (DFMGI)	5,157.1	0.69	-1.25	-3.02	-0.03	-0.03	1.66	9.86	5.42	764.89
Abu Dhabi (ADI)	9,415.8	0.42	-0.34	-1.56	-0.03	-0.03	2.38	18.22	2.32	2,648.23
Bahrain (BAX)	1,967.1	0.22	-0.35	0.35	-0.95	-0.95	0.88	8.87	5.01	7.48
Muscat SE INDEX	4,364.1	-0.94	-0.72	-1.62	-4.64	-4.64	0.77	9.17	6.53	7.03
SP GCC Comp LMC	187.6	0.00	-0.87	-2.20	-0.15	-0.15	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.2	0.00	-1.93	-3.99	-1.38	-1.38				

Developed Markets										
MSCI World Index	3,643.0	0.55	-2.60	-4.27	-1.75	-1.75				
U.S. (S&P 500)	5,599.3	0.49	-2.96	-5.97	-4.80	-4.80	4.34	24.92	1.64	49,616.30
U.K. (FTSE 100)	8,541.0	0.53	-1.60	-3.05	4.50	4.50	1.76	16.33	3.61	2,202.76
Japan (topix)	2,694.9	0.91	-0.51	0.48	-3.23	-3.23	1.40	13.64	2.33	938,492.59
Emerging Markets										
MSCI EM Index	1,111.1	0.18	-1.54	1.26	3.32	3.32				
China (SSE Composite)	3,371.9	-0.23	-0.02	1.54	0.60	0.60	1.36	12.00		44,025.04
India (Sensex)	74,029.8	-0.10	-0.41	1.14	-5.26	-5.26	4.01	20.87	1.21	145,156.19

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,997.7	0.01	-1.50	-1.28	8.63	8.63	1.64	14.98	3.47	48.18
Kuwait Premier Index	8,535.5	0.12	-1.48	-1.81	8.89	8.89	1.76	16.22	3.36	39.31
Kuwait Main Index	7,425.2	-0.49	-1.59	1.23	7.50	7.50	1.24	10.84	3.97	8.87
Kuwait Sector										
Banking	2,009.2	-0.28	-1.87	-0.97	11.02	11.02	1.97	16.21	2.93	30.19
Telecom	1,033.3	0.74	0.00	-3.33	1.53	1.53	1.54	10.83	8.19	3.13
Industrials	742.9	0.91	-1.29	-2.61	2.66	2.66	0.84	13.07	5.79	2.49
Financial Services	1,521.5	-0.01	-1.52	-3.01	0.72	0.72	1.22	12.40	2.76	5.08
Real Estate	1,547.9	1.04	-1.78	-0.94	14.40	14.40	1.15	17.34	1.91	3.26
Basic Materials	877.6	-0.10	-4.59	-5.83	-3.69	-3.69	1.58	10.82	9.97	0.50
Health Care	538.7	1.59	1.59	3.74	17.55	17.55	1.77	17.92	1.98	
Consumer Staples	1,001.5	-0.07	-2.60	-3.37	0.28	0.28	2.18	20.35	2.05	0.30
Insurance	2,084.7	-0.93	-0.79	0.96	1.43	1.43	1.10	10.63	3.89	0.85
Consumer Discretionary	2,441.5	1.12	3.21	5.07	15.01	15.01				
Energy	1,319.4	-0.98	-1.79	-3.31	10.96	10.96	1.11	10.25	4.77	0.27
Technology	1,156.7	-3.64	0.00	-28.38	11.19	11.19	1.39			0.02
Utilities	402.6	-0.65	-0.65	-1.29	1.32	1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased on Thursday after surging the day before as worries about the impact of intensifying tariff wars on global economic growth and energy demand outweighed the positive sentiment from a larger-than-expected draw in U.S. gasoline stocks. Brent futures fell 7 cents, or 0.1%, to \$70.88 a barrel by 0107 GMT, while U.S. West Texas Intermediate crude futures shed 11 cents, or 0.2%, to \$67.57 a barrel.

Kuwait Market

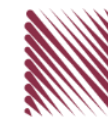
The market closed up by 0.01% at 7,997.7 value traded 165.6 million KD, Premier market value reached 46.6 million KD, closed up by 0.12% at 8,535.5

KSA Market

The market closed down by -0.11% at 11,704.9

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	1.029	-0.10	-1.25	-0.10	14.84	14.84	1.88	14.82	3.40	8.57
KFH	0.789	-0.13	-1.50	-1.50	5.76	5.76	2.21	17.01	2.79	13.50
ZAIN	0.469	1.08	0.00	-4.48	0.00	0.00	1.65	9.80	7.46	2.03
BOUBYAN BANK	0.653	0.62	-2.25	-2.54	16.40	16.40	2.58	30.22	1.53	2.74
AGILITY	0.261	1.16	-0.38	-4.40	5.67	5.67	0.68	10.89	7.66	0.70
Saudi Arabia										
ARAMCO	26.20	-0.38	-0.19	-3.32	-6.60	-6.60	4.35	16.09	6.78	6,339.22
SABIC	63.30	0.64	1.28	2.10	-5.52	-5.52	1.21	90.60	5.37	189.86
STC	44.00	-0.45	-1.35	-2.76	10.00	10.00	2.45	20.48	3.98	219.96
AL-RAJHI BANK	100.60	0.40	-0.79	0.80	6.34	6.34	3.27	21.53	2.39	402.32
NCB	34.45	-0.58	-1.01	-1.57	3.14	3.14	1.06	10.02	5.52	206.66
Abu Dhabi										
ETISALAT.AD	17.04	-2.63	2.04	2.16	4.41	4.41	3.25	13.78	4.78	148.19
FAB.AD	14.00	-1.69	-2.37	-1.69	1.89	1.89	1.18	9.48	5.36	153.25
EMIRATES NBD	20.05	-2.67	-3.61	-9.28	-6.53	-6.53	1.01	5.63	4.99	128.23
DB ISLAMIC DB	7.57	3.13	1.61	-2.07	6.77	6.77	1.10	7.28	5.94	54.67
EMAR.DU	13.25	2.32	-3.28	-2.21	3.11	3.11	1.37	8.67	7.55	116.67
Qatar										
QNB	16.450	-0.48	-1.20	-0.90	-4.86	-4.86	1.34	9.76	4.26	152.27
INDUSTREIS QAT	13.250	-0.15	0.00	0.15	-0.15	-0.15	2.12	17.85	5.58	79.26
QA ISLAMIC BK	21.080	0.00	0.86	1.20	-1.31	-1.31	1.60	11.35	3.80	49.92
MASRAF AL RAYA	2.301	-0.73	-1.07	-0.82	-6.58	-6.58	0.85	14.65	4.35	21.41
MESAIEED PETRO	1.387	-1.28	-1.56	-2.94	-7.22	-7.22	1.06	24.24	4.11	17.43
Oman										
BANK MUSCAT	0.254	0.00	-1.17	0.00	0.79	0.79	0.78	9.44	6.50	1.91
OMANTEL	0.805	-0.98	-0.12	-2.07	-14.36	-14.36	0.95	9.52	6.83	0.60
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	0.00	3.57	3.57	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.325	-2.69	-2.99	-2.69	-1.52	-1.52	0.67	7.99	6.15	0.22

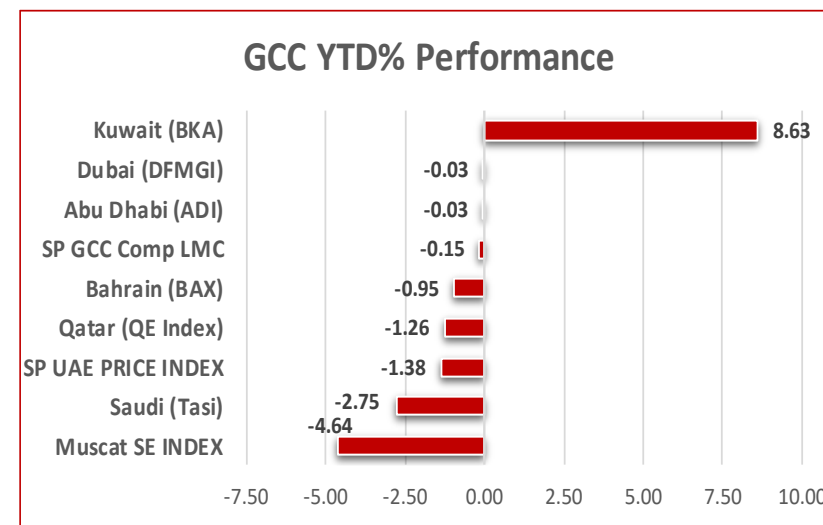
* GCC Markets performance at the latest close.

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 up today by 0.01%, the best performing sector today is health care at 1.59%.

KSA

Aramco closed today at -0.38%, Sabic closed at 0.64%, STC closed at -0.45%, and Al Rajhi closed at 0.40%.

UAE

ETISALAT.AD had closed today at -2.63%, FAB.AD closed with a with a negative performance at -1.69%.



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