



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 13th May 2025



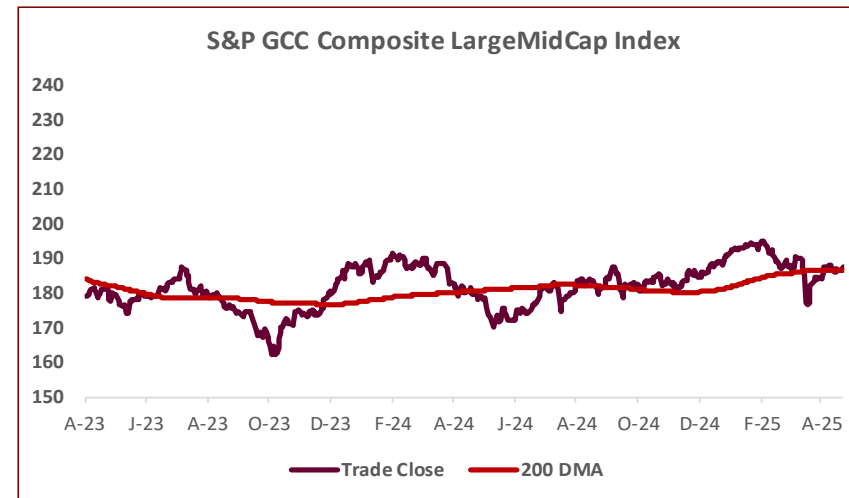


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,488.6	1.25	1.10	-1.57	-4.46	-4.55	2.09	15.74	3.71	9,492.94
Qatar (QE Index)	10,609.3	0.73	0.85	1.43	3.68	0.36	1.21	11.60	4.65	535.59
Dubai (DFMGI)	5,333.9	0.40	0.40	0.50	4.66	3.40	1.72	10.05	5.28	795.88
Abu Dhabi (ADI)	9,639.0	0.14	0.14	1.10	2.88	2.34	2.04	14.69	3.01	2,704.12
Bahrain (BAX)	1,916.4	-0.18	-0.04	0.22	-1.79	-3.50	0.85	8.36	5.24	7.43
Muscat SE INDEX	4,376.4	0.49	0.57	1.39	0.22	-4.37	0.78	9.13	6.49	7.12
SP GCC Comp LMC	187.9	0.77	0.71	-0.14	-1.20	0.01	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.7	0.20	0.20	1.94	4.64	3.58				

Developed Markets										
MSCI World Index	3,793.7	2.21	2.21	3.78	4.55	2.32				
U.S. (S&P 500)	5,844.2	3.26	3.26	4.94	4.14	-0.64	4.33	24.76	1.65	50,418.30
U.K. (FTSE 100)	8,605.0	0.59	0.59	1.30	0.26	5.29	1.80	16.29	3.55	2,236.97
Japan (topix)	2,742.1	0.31	0.31	2.80	3.13	-1.54	1.41	14.01	2.38	956,254.76
Emerging Markets										
MSCI EM Index	1,161.8	2.06	2.06	4.40	5.49	8.03				
China (SSE Composite)	3,369.2	0.82	0.82	2.75	1.00	0.52	1.36	12.00		44,025.04
India (Sensex)	82,429.9	3.74	3.74	2.73	6.48	5.49	4.47	23.04	1.14	160,766.08

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,064.8	0.11	0.67	1.32	-0.11	9.54	1.64	15.25	3.47	48.95
Kuwait Premier Index	8,729.5	0.08	0.72	2.06	0.63	11.36	1.83	16.79	3.30	40.69
Kuwait Main Index	6,997.7	0.28	0.43	-2.20	-3.71	1.31	1.09	10.14	4.33	8.26
Kuwait Sector										
Banking	2,025.5	-0.14	0.58	1.04	-0.91	11.92	1.95	16.40	3.03	30.82
Telecom	1,039.9	0.19	0.49	0.95	-0.95	2.18	1.56	10.71	7.31	3.17
Industrials	761.2	0.58	0.35	1.15	2.16	5.19	1.12	14.40	5.00	2.56
Financial Services	1,507.2	0.75	1.01	1.89	-0.08	-0.22	1.16	13.20	3.27	4.99
Real Estate	1,624.5	0.78	1.58	2.11	7.08	20.06	1.13	18.38	1.83	3.43
Basic Materials	896.4	0.01	-2.26	-1.56	-0.28	-1.64	1.59	10.97	10.17	0.51
Health Care	568.4	-2.10	-2.10	-2.10	-0.38	24.03	1.99	22.88	1.81	
Consumer Staples	1,089.1	-0.56	0.06	3.75	10.34	9.05	2.29	21.27	2.35	0.33
Insurance	1,839.5	0.48	1.46	1.62	-13.73	-10.50	0.93	8.77	3.53	0.74
Consumer Discretionary	2,463.2	1.37	2.00	6.17	4.34	16.03				
Energy	1,348.4	-2.87	-2.25	-2.72	1.77	13.39	1.12	9.73	5.26	0.28
Technology	1,127.6	1.31	0.65	0.00	4.73	8.39	1.30			0.02
Utilities	386.8	0.68	0.68	-0.68	-4.55	-2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased on Tuesday from a two-week high, weighed down by concerns about rising supplies, despite earlier optimism over the pause in the U.S.-China trade war after both countries temporarily cut tariffs. Brent crude futures dropped 22 cents, or 0.3%, to \$64.74 per barrel by 0248 GMT. U.S. West Texas Intermediate (WTI) crude fell 18 cents, or 0.3%, to \$61.77.

Kuwait Market

The market closed up by 0.11% at 8,064.8 value traded 90.2 million KD, Premier market value reached 55.2 million KD, closed up by 0.08% at 8,729.5.

KSA Market

The market closed up by 1.25% at 11,488.6.

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	0.959	0.00	0.42	0.74	-3.92	12.38	1.88	14.82	3.48	8.39
KFH	0.741	-0.13	0.95	2.49	0.66	7.28	2.13	17.14	2.75	13.71
ZAIN	0.480	0.42	1.05	1.48	0.00	2.35	1.69	10.03	7.29	2.08
BOUBYAN BANK	0.678	0.00	0.00	-0.15	3.78	26.90	2.87	32.82	1.40	2.99
AGILITY	0.264	1.54	0.76	0.38	4.76	6.88	0.66	10.60	3.79	0.71
Saudi Arabia										
ARAMCO	25.55	2.20	2.86	0.79	-4.49	-8.91	4.24	15.69	6.36	6,183.10
SABIC	60.50	3.07	2.89	-0.82	-5.02	-9.70	1.16	719.55	5.62	181.50
STC	45.95	0.22	0.99	-3.47	1.32	14.88	2.52	20.29	4.13	229.75
AL-RAJHI BANK	96.90	0.94	0.41	-0.51	-5.00	2.43	2.89	19.25	2.80	387.60
NCB	35.05	0.14	-0.28	-1.82	-2.23	4.94	1.08	9.79	5.42	210.30
Abu Dhabi										
ETISALAT.AD	17.24	-0.23	-0.23	-0.92	2.01	5.64	2.94	10.88	4.81	149.93
FAB.AD	15.50	-0.64	-0.64	3.20	12.16	12.81	1.34	9.88	4.84	171.24
EMIRATES NBD	21.30	1.19	1.19	3.65	5.45	-0.70	1.06	6.12	4.69	134.54
DB ISLAMIC DB	7.59	0.53	0.53	0.40	5.86	7.05	1.21	7.16	5.93	54.96
EMAR.DU	13.25	-0.75	-0.75	1.15	-0.75	3.11	1.37	8.19	7.55	117.11
Qatar										
QNB	17.190	1.96	1.72	2.93	6.77	-0.58	1.39	10.10	4.07	158.30
INDUSTREIS QAT	12.200	1.24	1.67	-2.87	-5.35	-8.06	2.04	17.56	6.07	73.59
QA ISLAMIC BK	21.500	-0.42	0.51	1.85	4.52	0.66	1.65	11.48	3.72	50.65
MASRAF AL RAYA	2.292	1.33	0.53	2.69	1.87	-6.94	0.87	14.57	4.36	21.25
MESAIEED PETRO	1.402	1.67	1.74	-0.57	-2.50	-6.22	1.09	24.77	4.07	17.56
Oman										
BANK MUSCAT	0.268	0.75	1.13	5.10	5.93	6.35	0.85	9.75	6.16	2.02
OMANTEL	0.819	0.24	0.61	0.12	-3.65	-12.87	0.92	7.96	6.72	0.62
BANK DHOFAR	0.147	0.00	-0.68	-1.34	2.85	-4.40	0.61	12.89	4.39	0.45
NAT BANK OF OMAN	0.295	1.72	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.221	0.00	0.45	1.84	-9.00	-6.24	0.64	7.61	6.46	0.21

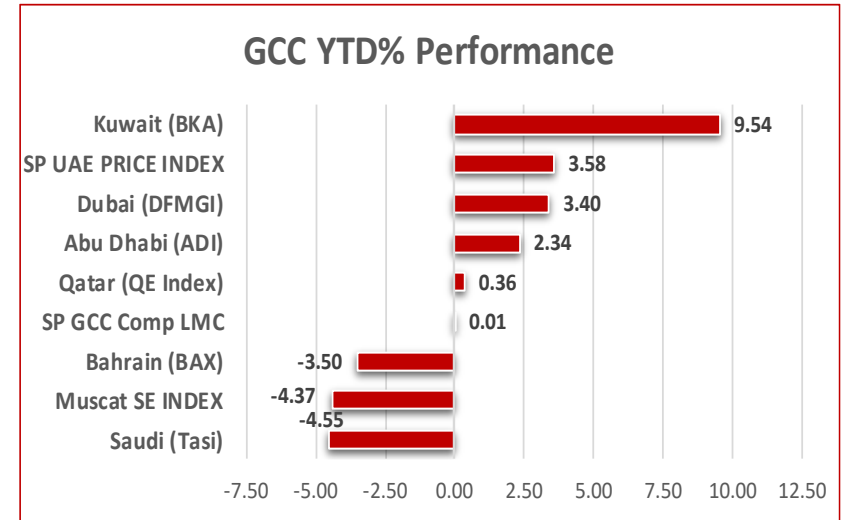
* GCC Markets performance at the latest close.

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 0.11%, the best performing sector today is consumer discretionary at 1.37%.

KSA

Aramco closed at 2.20%, Sabic closed at 3.07%. STC closed at 0.22% and Al-Rajhi closed at 0.94%.

UAE

ETISALAT.AD closed at -0.23%, FAB.AD closed at -0.64%.



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