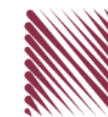


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 14th May 2025



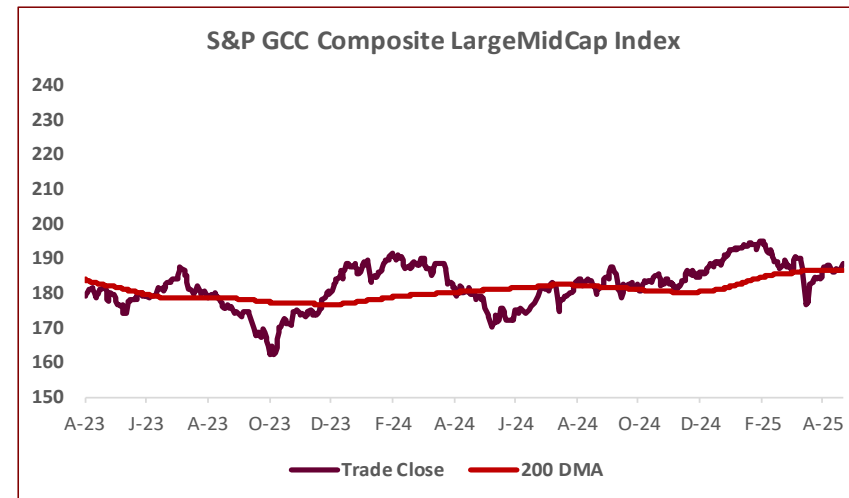


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,532.3	0.38	1.48	-1.19	-4.10	-4.19	2.10	15.76	3.70	9,508.16
Qatar (QE Index)	10,585.6	-0.22	0.62	1.20	3.45	0.14	1.20	11.57	4.66	533.73
Dubai (DFMGI)	5,362.7	0.54	0.94	1.05	5.23	3.95	1.73	10.11	5.25	799.70
Abu Dhabi (ADI)	9,631.5	-0.08	0.06	1.02	2.80	2.26	2.03	14.67	3.02	2,701.41
Bahrain (BAX)	1,918.3	0.10	0.06	0.32	-1.69	-3.40	0.85	8.38	5.24	7.44
Muscat SE INDEX	4,361.3	-0.35	0.22	1.04	-0.13	-4.70	0.77	9.10	6.52	7.08
SP GCC Comp LMC	188.6	0.37	1.09	0.23	-0.83	0.38	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	158.2	0.32	0.52	2.27	4.98	3.91				

Developed Markets										
MSCI World Index	3,823.1	0.77	3.00	4.58	5.36	3.11				
U.S. (S&P 500)	5,886.6	0.72	4.00	5.70	4.89	0.08	4.47	25.57	1.60	52,071.62
U.K. (FTSE 100)	8,602.9	-0.02	0.56	1.27	0.23	5.26	1.81	16.29	3.55	2,236.29
Japan (topix)	2,772.1	1.10	1.41	3.93	4.27	-0.46	1.42	14.18	2.36	965,652.50
Emerging Markets										
MSCI EM Index	1,156.8	-0.43	1.62	3.95	5.03	7.56				
China (SSE Composite)	3,374.9	0.17	0.98	2.92	1.17	0.69	1.36	12.00		44,025.04
India (Sensex)	81,148.2	-1.55	2.13	1.13	4.82	3.85	4.40	22.66	1.16	158,319.93

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,083.0	0.23	0.90	1.55	0.11	9.79	1.64	15.27	3.47	49.00
Kuwait Premier Index	8,750.9	0.25	0.97	2.31	0.88	11.64	1.83	16.81	3.30	40.72
Kuwait Main Index	7,007.0	0.13	0.56	-2.07	-3.59	1.44	1.10	10.17	4.33	8.29
Kuwait Sector										
Banking	2,029.5	0.20	0.78	1.24	-0.72	12.14	1.95	16.38	3.03	30.78
Telecom	1,057.7	1.71	2.21	2.68	0.74	3.93	1.56	10.73	7.29	3.18
Industrials	762.8	0.21	0.56	1.36	2.38	5.41	1.13	14.49	4.97	2.58
Financial Services	1,508.9	0.12	1.13	2.01	0.04	-0.11	1.17	13.30	3.25	5.03
Real Estate	1,618.6	-0.36	1.21	1.74	6.69	19.62	1.13	18.52	1.81	3.45
Basic Materials	895.9	-0.05	-2.31	-1.61	-0.33	-1.69	1.59	10.98	10.17	0.51
Health Care	565.0	-0.59	-2.68	-2.68	-0.98	23.29	1.95	22.40	1.84	
Consumer Staples	1,069.6	-1.79	-1.73	1.90	8.37	7.10	2.28	21.17	2.36	0.33
Insurance	1,839.9	0.02	1.48	1.64	-13.71	-10.48	0.94	8.81	3.51	0.74
Consumer Discretionary	2,461.7	-0.06	1.94	6.11	4.28	15.96				
Energy	1,381.7	2.47	0.17	-0.31	4.28	16.19	1.09	9.45	5.41	0.27
Technology	1,207.7	7.10	7.79	7.10	12.16	16.08	1.31			0.02
Utilities	381.6	-1.36	-0.68	-2.03	-5.84	-3.97				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

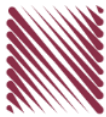
Crude oil futures climbed about 3% on Tuesday, lifted by a temporary cut in U.S.-China tariffs and a better-than-expected inflation report. Brent crude futures rose \$1.67, or 2.57%, to close at \$66.63 a barrel. U.S. West Texas Intermediate (WTI) crude gained \$1.72, or 2.78%, to settle at \$63.67.

Kuwait Market

The market closed up by 0.23% at 8,083.0 value traded 105.7 million KD, Premier market value reached 68.8 million KD, closed up by 0.25% at 8,750.9.

KSA Market

The market closed up by 0.38% at 11,532.3.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.961	0.21	0.63	0.95	-3.72	12.62	1.88	14.85	3.47	8.40
KFH	0.741	0.00	0.95	2.49	0.66	7.28	2.13	17.14	2.75	13.69
ZAIN	0.491	2.29	3.37	3.81	2.29	4.69	1.73	10.26	7.13	2.12
BOUBYAN BANK	0.680	0.29	0.29	0.15	4.08	27.27	2.88	32.91	1.40	3.00
AGILITY	0.265	0.38	1.15	0.76	5.16	7.29	0.67	10.64	3.77	0.71
Saudi Arabia										
ARAMCO	25.55	0.00	2.86	0.79	-4.49	-8.91	4.19	16.00	6.36	6,183.10
SABIC	60.80	0.50	3.40	-0.33	-4.55	-9.25	1.17	723.12	5.59	182.40
STC	46.00	0.11	1.10	-3.36	1.43	15.00	2.52	20.31	4.13	230.00
AL-RAJHI BANK	98.10	1.24	1.66	0.72	-3.82	3.70	2.93	19.48	2.76	392.40
NCB	35.45	1.14	0.85	-0.70	-1.12	6.14	1.09	9.91	5.36	212.70
Abu Dhabi										
ETISALAT.AD	17.10	-0.81	-1.04	-1.72	1.18	4.78	2.92	10.79	4.85	148.71
FAB.AD	15.48	-0.13	-0.77	3.06	12.01	12.66	1.34	9.87	4.84	171.02
EMIRATES NBD	21.50	0.94	2.14	4.62	6.44	0.23	1.07	6.18	4.65	135.81
DB ISLAMIC DB	7.82	3.03	3.58	3.44	9.07	10.30	1.24	7.38	5.75	56.62
EMAR.DU	13.50	1.89	1.12	3.05	1.12	5.06	1.40	8.34	7.41	119.32
Qatar										
QNB	17.100	-0.52	1.18	2.40	6.21	-1.10	1.39	10.05	4.09	157.94
INDUSTREIS QAT	12.110	-0.74	0.92	-3.58	-6.05	-8.74	2.03	17.43	6.11	73.27
QA ISLAMIC BK	21.550	0.23	0.75	2.08	4.76	0.89	1.65	11.51	3.71	50.92
MASRAF AL RAYA	2.292	0.00	0.53	2.69	1.87	-6.94	0.87	14.57	4.36	21.32
MESAIEED PETRO	1.394	-0.57	1.16	-1.13	-3.06	-6.76	1.08	24.63	4.09	17.51
Oman										
BANK MUSCAT	0.266	-0.75	0.38	4.31	5.14	5.56	0.84	9.68	6.20	2.00
OMANTEL	0.823	0.49	1.11	0.61	-3.18	-12.45	0.93	8.00	6.68	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	0.00	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.220	-0.45	0.00	1.38	-9.41	-6.67	0.64	7.57	6.49	0.21

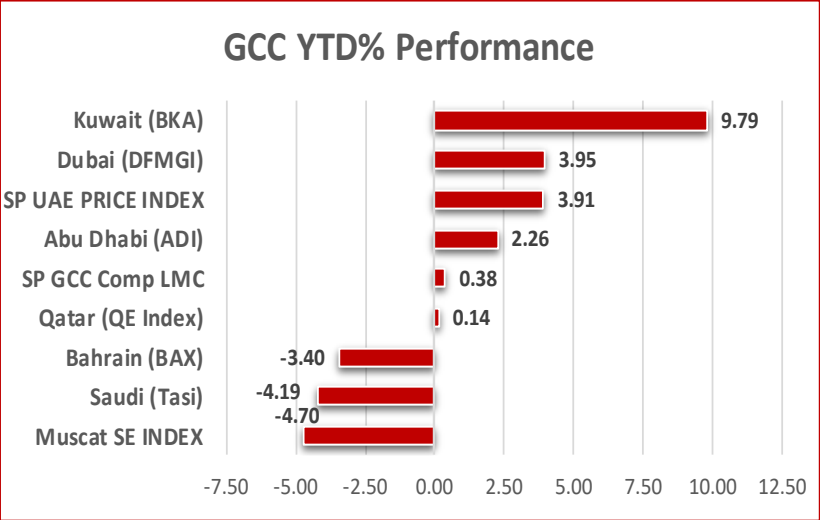
* GCC Markets performance at the latest close.

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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today up 0.23%, the best performing sector today is technology at 7.10%.

KSA

Aramco closed flat at 0%, Sabic closed at 0.50%. STC closed at 0.11% and Al-Rajhi closed at 1.24%.

UAE

ETISALAT.AD closed at -0.81%, FAB.AD closed at -0.13%.



شركة الاستثمار الوطنية
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