

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

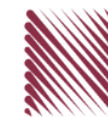
GCC DAILY MORNING BRIEF

Thursday, 15th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

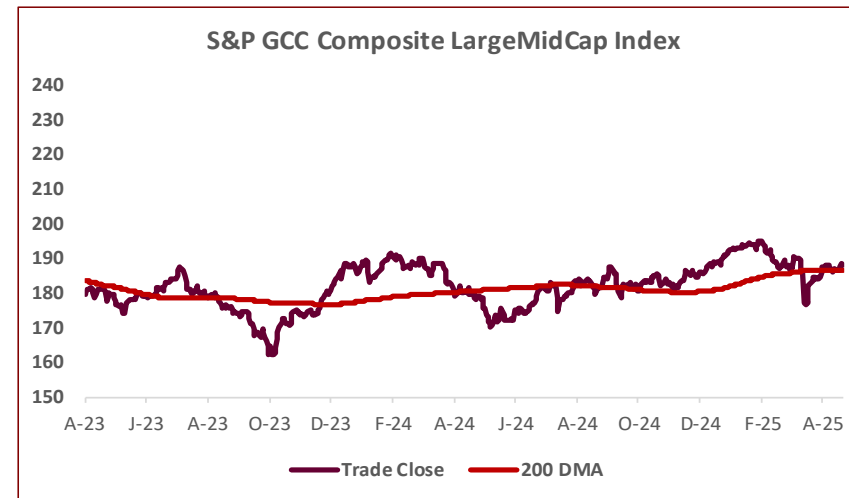


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,532.0	0.00	1.48	-1.20	-4.10	-4.19	2.09	15.73	3.71	9,623.76
Qatar (QE Index)	10,593.5	0.08	0.70	1.28	3.52	0.21	1.20	11.58	4.65	535.05
Dubai (DFMGI)	5,359.7	-0.06	0.89	0.99	5.17	3.90	1.73	10.03	5.27	797.07
Abu Dhabi (ADI)	9,621.3	-0.11	-0.05	0.91	2.69	2.15	2.03	14.65	3.02	2,698.08
Bahrain (BAX)	1,920.2	0.10	0.16	0.42	-1.59	-3.31	0.84	8.44	5.24	7.45
Muscat SE INDEX	4,397.3	0.82	1.04	1.88	0.69	-3.92	0.78	9.17	6.45	7.16
SP GCC Comp LMC	188.2	-0.19	0.90	0.04	-1.02	0.19	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.5	-0.46	0.07	1.81	4.50	3.44				

Developed Markets										
MSCI World Index	3,830.7	0.20	3.21	4.79	5.57	3.31				
U.S. (S&P 500)	5,892.6	0.10	4.11	5.81	5.00	0.19	4.50	25.76	1.59	52,454.57
U.K. (FTSE 100)	8,585.0	-0.21	0.35	1.06	0.03	5.04	1.80	16.26	3.55	2,231.36
Japan (topix)	2,763.3	-0.32	1.09	3.60	3.93	-0.78	1.41	14.14	2.38	961,813.55
Emerging Markets										
MSCI EM Index	1,173.7	1.45	3.10	5.46	6.56	9.13				
China (SSE Composite)	3,403.9	0.86	1.85	3.81	2.04	1.56	1.36	12.00		44,025.04
India (Sensex)	81,330.6	0.22	2.36	1.36	5.06	4.08	4.40	23.09	1.16	158,803.83

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,085.0	0.02	0.93	1.58	0.14	9.81	1.65	15.28	3.46	49.11
Kuwait Premier Index	8,754.7	0.04	1.01	2.35	0.92	11.69	1.83	16.85	3.29	40.81
Kuwait Main Index	7,002.0	-0.07	0.49	-2.14	-3.65	1.37	1.10	10.11	4.33	8.30
Kuwait Sector										
Banking	2,026.2	-0.16	0.62	1.07	-0.88	11.95	1.95	16.41	3.03	30.84
Telecom	1,051.7	-0.57	1.63	2.09	0.17	3.33	1.59	10.91	7.17	3.23
Industrials	763.4	0.08	0.64	1.44	2.46	5.49	1.13	14.51	4.96	2.58
Financial Services	1,516.7	0.51	1.65	2.53	0.55	0.41	1.17	13.15	3.24	5.04
Real Estate	1,619.1	0.03	1.24	1.77	6.72	19.66	1.13	18.50	1.82	3.43
Basic Materials	899.5	0.41	-1.91	-1.21	0.07	-1.29	1.59	10.97	10.18	0.51
Health Care	565.0	0.00	-2.68	-2.68	-0.98	23.29	1.94	22.27	1.85	
Consumer Staples	1,070.3	0.06	-1.66	1.97	8.44	7.17	2.24	20.76	2.40	0.32
Insurance	1,891.3	2.79	4.31	4.48	-11.30	-7.98	0.94	8.81	3.51	0.74
Consumer Discretionary	2,477.0	0.62	2.57	6.77	4.93	16.69				
Energy	1,479.9	7.10	7.28	6.77	11.69	24.45	1.11	9.68	5.28	0.28
Technology	1,134.9	-6.02	1.30	0.65	5.41	9.09	1.41			0.02
Utilities	381.6	0.00	-0.68	-2.03	-5.84	-3.97				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

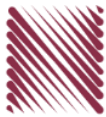
Oil prices eased on Wednesday after government data showed U.S. crude oil stockpiles rose unexpectedly last week, prompting investor concerns of excess supplies. Brent crude futures fell 54 cents, or 0.81%, to close at \$66.09 a barrel. U.S. West Texas Intermediate crude slipped 52 cents, or 0.82%, to settle at \$63.15.

Kuwait Market

The market closed up by 0.02% at 8,085.0 value traded 80.6 million KD, Premier market value reached 50.6 million KD, closed up by 0.04% at 8,754.7.

KSA Market

The market closed flat at 0.0% at 11,532.0.



* 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	-0.21	0.42	0.74	-3.92	12.38	1.88	14.82	3.48	8.39
KFH	0.743	0.27	1.23	2.77	0.94	7.57	2.13	17.18	2.74	13.73
ZAIN	0.487	-0.81	2.53	2.96	1.46	3.84	1.65	9.31	7.19	2.11
BOUBYAN BANK	0.679	-0.15	0.15	0.00	3.93	27.09	2.87	32.87	1.40	3.00
AGILITY	0.263	-0.75	0.38	0.00	4.37	6.48	0.66	10.56	3.80	0.70
Saudi Arabia										
ARAMCO	26.10	2.15	5.07	2.96	-2.43	-6.95	4.28	16.35	6.23	6,316.37
SABIC	60.50	-0.49	2.89	-0.82	-5.02	-9.70	1.16	719.55	5.62	181.50
STC	43.50	-5.43	-4.40	-8.61	-4.08	8.75	2.38	19.20	4.37	217.51
AL-RAJHI BANK	98.30	0.20	1.87	0.92	-3.63	3.91	2.93	19.52	2.76	393.21
NCB	35.80	0.99	1.85	0.28	-0.14	7.19	1.10	10.00	5.31	214.81
Abu Dhabi										
ETISALAT.AD	17.16	0.35	-0.69	-1.38	1.54	5.15	2.93	10.83	4.84	149.24
FAB.AD	15.68	1.29	0.51	4.39	13.46	14.12	1.36	10.00	4.78	173.23
EMIRATES NBD	21.25	-1.16	0.95	3.41	5.20	-0.93	1.06	6.11	4.71	134.23
DB ISLAMIC DB	7.80	-0.26	3.31	3.17	8.79	10.01	1.24	7.36	5.77	56.48
EMAR.DU	13.20	-2.22	-1.12	0.76	-1.12	2.72	1.37	8.63	7.58	116.67
Qatar										
QNB	17.200	0.58	1.78	2.99	6.83	-0.52	1.39	10.11	4.07	158.87
INDUSTREIS QAT	12.170	0.50	1.42	-3.11	-5.59	-8.29	2.04	17.52	6.08	73.63
QA ISLAMIC BK	21.460	-0.42	0.33	1.66	4.33	0.47	1.64	11.46	3.73	50.71
MASRAF AL RAYA	2.324	1.40	1.93	4.12	3.29	-5.64	0.88	14.78	4.30	21.61
MESAIEED PETRO	1.391	-0.22	0.94	-1.35	-3.27	-6.96	1.08	24.58	4.10	17.48
Oman										
BANK MUSCAT	0.271	1.88	2.26	6.27	7.11	7.54	0.85	9.86	6.09	2.03
OMANTEL	0.820	-0.36	0.74	0.24	-3.53	-12.77	0.92	7.97	6.71	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	0.225	2.27	2.27	3.69	-7.35	-4.55	0.68	7.22	6.35	0.21

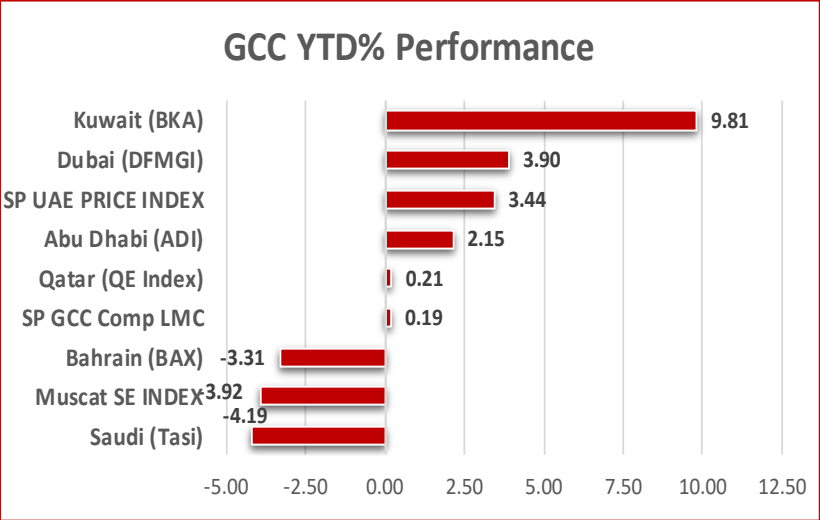
* GCC Markets performance at the latest close.

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 0.02%, the best performing sector today is energy at 7.10%.

KSA

Aramco closed at 2.15%, Sabic closed at -0.49%. STC closed at -5.43% and Al-Rajhi closed at 0.20%.

UAE

ETISALAT.AD closed at 0.35%, FAB.AD closed at 1.29%.



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