



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 16th March 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

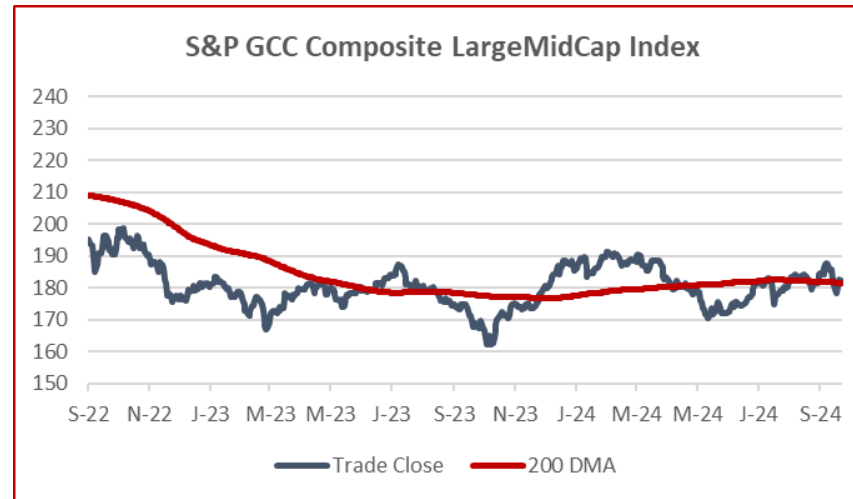


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,725.9	0.18	-0.72	-3.19	-2.58	-2.58	2.14	17.50	3.56	9,605.70
Qatar (QE Index)	10,423.2	-0.14	-0.86	-0.22	-1.40	-1.40	1.18	11.35	4.75	524.79
Dubai (DFMGI)	5,140.6	-0.85	-1.57	-3.33	-0.35	-0.35	1.65	9.83	5.43	761.91
Abu Dhabi (ADI)	9,418.7	0.08	-0.31	-1.53	0.00	0.00	2.38	18.26	2.32	2,649.34
Bahrain (BAX)	1,972.3	0.27	-0.08	0.62	-0.68	-0.68	0.88	8.89	5.00	7.50
Muscat SE INDEX	4,387.4	0.53	-0.18	-1.09	-4.13	-4.13	0.77	9.05	6.52	7.05
SP GCC Comp LMC	187.6	-0.07	-0.90	-2.23	-0.18	-0.18	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.3	-0.27	-1.15	-3.23	-0.59	-0.59				

Developed Markets										
MSCI World Index	3,665.7	1.83	-2.00	-3.67	-1.14	-1.14				
U.S. (S&P 500)	5,638.9	2.13	-2.27	-5.30	-4.13	-4.13	4.39	25.25	1.62	50,191.52
U.K. (FTSE 100)	8,632.3	1.05	-0.55	-2.01	5.62	5.62	1.78	16.49	3.57	2,225.72
Japan (topix)	2,715.9	0.65	0.27	1.26	-2.48	-2.48	1.41	13.74	2.31	944,916.26
Emerging Markets										
MSCI EM Index	1,119.6	1.22	-0.79	2.04	4.10	4.10				
China (SSE Composite)	3,419.6	1.81	1.39	2.97	2.02	2.02	1.36	12.00		44,025.04
India (Sensex)	73,828.9	-0.27	-0.68	0.86	-5.52	-5.52	4.00	20.81	1.21	144,730.42

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,908.0	-1.12	-2.60	-2.39	7.41	7.41	1.62	14.82	3.50	47.64
Kuwait Premier Index	8,475.9	-0.70	-2.17	-2.50	8.13	8.13	1.75	16.13	3.38	39.08
Kuwait Main Index	7,199.0	-3.05	-4.58	-1.85	4.22	4.22	1.19	10.45	4.10	8.56
Kuwait Sector										
Banking	1,998.3	-0.54	-2.40	-1.51	10.42	10.42	1.95	16.07	2.96	29.94
Telecom	1,031.9	-0.14	-0.14	-3.47	1.39	1.39	1.55	10.90	8.15	3.15
Industrials	731.7	-1.51	-2.78	-4.09	1.11	1.11	0.84	13.00	5.82	2.48
Financial Services	1,508.3	-0.87	-2.38	-3.86	-0.15	-0.15	1.21	12.34	2.79	5.04
Real Estate	1,495.4	-3.39	-5.12	-4.30	10.51	10.51	1.12	16.91	1.92	3.19
Basic Materials	866.2	-1.30	-5.83	-7.05	-4.94	-4.94	1.56	10.67	10.11	0.49
Health Care	538.7	0.00	1.59	3.74	17.55	17.55	1.80	18.21	1.95	
Consumer Staples	1,000.8	-0.07	-2.67	-3.44	0.21	0.21	2.02	20.32	2.05	0.30
Insurance	2,081.7	-0.14	-0.93	0.82	1.29	1.29	1.08	10.51	3.93	0.84
Consumer Discretionary	2,191.8	-10.23	-7.34	-5.67	3.25	3.25				
Energy	1,318.3	-0.09	-1.87	-3.39	10.86	10.86	1.09	10.13	4.82	0.27
Technology	1,171.3	1.26	1.26	-27.48	12.59	12.59	1.36			0.02
Utilities	402.6	0.00	-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 rebounded by 1% on Friday to end the week nearly unchanged as investors weighed the diminishing prospects of a quick end to the Ukraine war that could bring back more Russian energy supplies to Western markets. Brent crude futures settled 70 cents, or 1%, higher at \$70.58 a barrel, after falling 1.5% in the previous session. U.S. West Texas Intermediate crude (WTI) closed at \$67.18 a barrel, up 63 cents, or 1%, after losing 1.7% on Thursday.

Kuwait Market

The market closed down by -1.12% at 7,908.0 value traded 129.8 million KD, Premier market value reached 37.7 million KD, closed down by -0.70% at 8,475.9

KSA Market

The market closed up by 0.18% at 11,725.9

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	1.024	-0.49	-1.73	-0.58	14.29	14.29	1.87	14.75	3.42	8.53
KFH	0.784	-0.63	-2.12	-2.12	5.09	5.09	2.20	16.90	2.81	13.41
ZAIN	0.468	-0.21	-0.21	-4.68	-0.21	-0.21	1.65	9.78	7.48	2.03
BOUBYAN BANK	0.652	-0.15	-2.40	-2.69	16.22	16.22	2.58	30.17	1.53	2.74
AGILITY	0.254	-2.68	-3.05	-6.96	2.83	2.83	0.66	10.60	7.87	0.68
Saudi Arabia										
ARAMCO	25.95	-0.95	-1.14	-4.24	-7.49	-7.49	4.30	15.94	6.84	6,279.90
SABIC	63.30	0.00	1.28	2.10	-5.52	-5.52	1.21	90.60	5.37	189.90
STC	43.70	-0.68	-2.02	-3.43	9.25	9.25	2.44	20.34	4.00	218.50
AL-RAJHI BANK	101.20	0.60	-0.20	1.40	6.98	6.98	3.29	21.66	2.37	404.80
NCB	34.50	0.15	-0.86	-1.43	3.29	3.29	1.07	10.04	5.51	207.00
Abu Dhabi										
ETISALAT.AD	17.20	1.40	4.43	4.56	6.86	6.86	3.33	14.11	4.67	151.67
FAB.AD	13.94	1.15	-1.67	-0.98	2.62	2.62	1.19	9.54	5.32	155.68
EMIRATES NBD	20.20	0.25	-2.88	-8.60	-5.83	-5.83	1.01	5.68	4.95	127.60
DB ISLAMIC DB	7.55	0.00	1.34	-2.33	6.49	6.49	1.10	7.26	5.96	54.67
EMAR.DU	13.10	-2.24	-4.38	-3.32	1.95	1.95	1.36	8.57	7.63	115.79
Qatar										
QNB	16.400	-0.30	-1.50	-1.20	-5.15	-5.15	1.34	9.73	4.27	151.94
INDUSTREIS QAT	13.190	-0.45	-0.45	-0.30	-0.60	-0.60	2.11	17.77	5.61	79.86
QA ISLAMIC BK	21.070	-0.05	0.81	1.15	-1.36	-1.36	1.60	11.35	3.80	49.62
MASRAF AL RAYA	2.296	-0.22	-1.29	-1.03	-6.78	-6.78	0.85	14.61	4.36	21.35
MESAIEED PETRO	1.390	0.22	-1.35	-2.73	-7.02	-7.02	1.07	24.30	4.10	17.40
Oman										
BANK MUSCAT	0.255	0.39	-0.78	0.39	1.19	1.19	0.78	9.48	6.47	1.91
OMANTEL	0.804	-0.12	-0.25	-2.19	-14.47	-14.47	0.91	7.81	6.84	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	0.300	3.45	7.14	7.14	1.35	1.35	0.64	9.69	3.13	0.49
OMINVEST	0.330	1.54	-1.49	-1.20	0.00	0.00	0.68	8.11	6.06	0.22

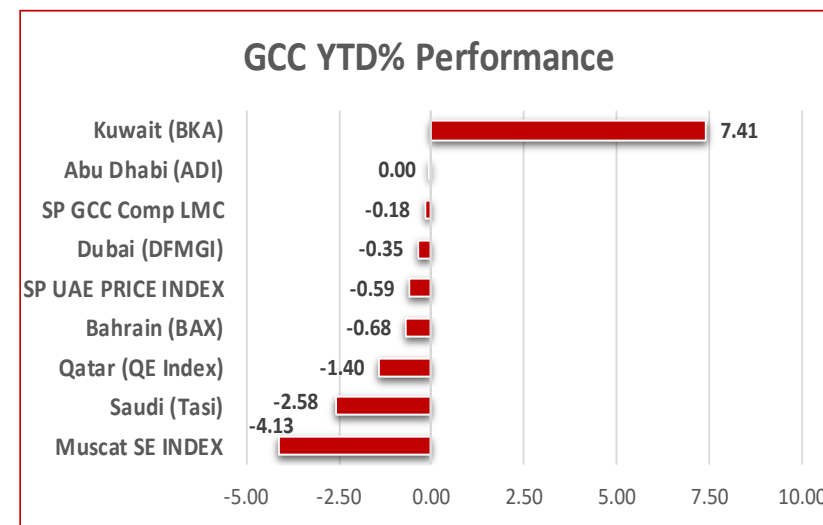
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
05-Mar. 25	25.41%	15.46%	0.06%	4.22%	8.79%	18.09%	13.51%	6.68%	6.98%
12-Mar. 25	25.52%	15.37%	0.06%	4.53%	9.16%	18.11%	13.54%	6.70%	7.20%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -1.12%, the worst performing sector today is consumer discretionary at -10.23%.

KSA

Aramco closed today at -0.95%, Sabic closed flat, STC closed at -0.68%, and Al Rajhi closed at 0.60%.

UAE

ETISALAT.AD had closed today at 1.40%, FAB.AD closed with a with a positive performance at 1.15%.



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