

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

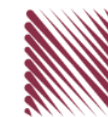
GCC DAILY MORNING BRIEF

Thursday, 17th April 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

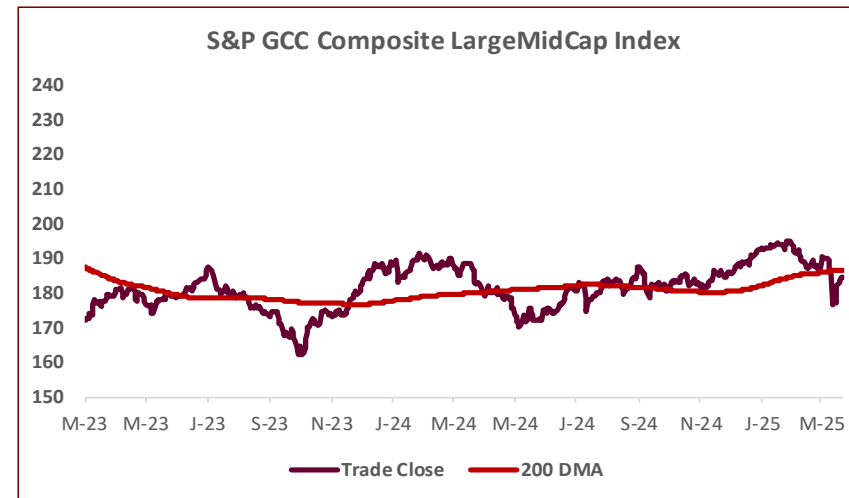


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,634.4	0.15	1.15	-3.25	-3.25	-3.34	2.11	16.36	3.71	9,556.66
Qatar (QE Index)	10,198.4	-0.15	1.02	-0.34	-0.34	-3.53	1.16	11.07	4.85	514.33
Dubai (DFMGI)	5,053.4	-0.49	1.76	-0.84	-0.84	-2.04	1.63	9.63	5.59	751.41
Abu Dhabi (ADI)	9,260.5	-0.32	1.12	-1.16	-1.16	-1.68	1.93	14.57	3.19	2,608.61
Bahrain (BAX)	1,910.3	0.38	0.45	-2.10	-2.10	-3.81	0.85	8.57	5.20	7.42
Muscat SE INDEX	4,304.4	0.62	0.80	-1.43	-1.43	-5.95	0.76	8.90	6.66	6.94
SP GCC Comp LMC	184.8	0.09	1.26	-2.82	-2.82	-1.63	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	147.0	-0.58	2.26	-2.45	-2.45	-3.44				

Developed Markets										
MSCI World Index	3,468.5	-1.54	-0.08	-4.41	-4.41	-6.46				
U.S. (S&P 500)	5,275.7	-2.24	-1.63	-5.99	-5.99	-10.30	4.20	24.00	1.71	48,145.10
U.K. (FTSE 100)	8,275.6	0.32	3.91	-3.58	-3.58	1.26	1.74	15.82	3.70	2,155.87
Japan (topix)	2,498.0	-0.61	1.26	-6.04	-6.04	-10.30	1.29	12.66	2.52	872,516.95
Emerging Markets										
MSCI EM Index	1,059.1	-1.04	1.33	-3.84	-3.84	-1.52				
China (SSE Composite)	3,276.0	0.26	1.17	-1.79	-1.79	-2.26	1.36	12.00		44,025.04
India (Sensex)	77,044.3	0.40	2.51	-0.48	-0.48	-1.40	4.18	21.71	1.16	150,299.42

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,813.3	0.10	-0.08	-3.23	-3.23	6.12	1.63	14.76	3.57	47.46
Kuwait Premier Index	8,366.0	0.10	-0.15	-3.56	-3.56	6.73	1.79	16.03	3.45	38.98
Kuwait Main Index	7,145.3	0.11	0.22	-1.68	-1.68	3.45	1.14	10.48	4.16	8.48
Kuwait Sector										
Banking	1,974.5	0.08	-0.35	-3.41	-3.41	9.10	1.96	15.95	3.11	30.01
Telecom	1,021.5	0.71	-1.56	-2.70	-2.70	0.37	1.52	10.71	7.48	3.10
Industrials	727.9	-0.03	0.37	-2.30	-2.30	0.59	1.08	13.10	5.98	2.46
Financial Services	1,459.2	0.15	1.78	-3.26	-3.26	-3.40	1.13	12.50	2.91	4.86
Real Estate	1,510.1	0.37	1.85	-0.46	-0.46	11.60	1.05	17.17	1.93	3.19
Basic Materials	865.6	-0.88	-1.86	-3.70	-3.70	-5.01	1.55	10.69	10.03	0.49
Health Care	570.3	0.00	-0.05	-0.05	-0.05	24.44	1.96	22.48	1.84	
Consumer Staples	911.7	0.12	0.73	-7.63	-7.63	-8.71	1.90	17.50	2.82	0.28
Insurance	1,915.5	-1.88	-6.67	-10.16	-10.16	-6.80	0.99	9.51	3.75	0.79
Consumer Discretionary	2,276.9	0.44	1.76	-3.54	-3.54	7.26				
Energy	1,268.3	-1.18	-1.40	-4.27	-4.27	6.66	1.04	9.09	5.69	0.26
Technology	1,113.1	2.68	5.52	3.38	3.38	6.99	1.26			0.01
Utilities	389.5	-1.34	0.68	-3.90	-3.90	-1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices extended gains on Thursday on the prospect of tighter supply after Washington imposed further sanctions to curb Iranian oil trade and as some OPEC producers pledged further output cuts to compensate for pumping above agreed quotas. Brent crude futures rose 34 cents, or 0.5%, to \$66.19 a barrel by 0029 GMT, and U.S. West Texas Intermediate crude was at \$62.91 a barrel, up 44 cents, or 0.7%.

Kuwait Market

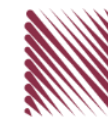
The market closed up by 0.10% at 7,813.3 value traded 87.1 million KD, Premier market value reached 62.9 million KD, closed up by 0.10% at 8,366.0.

KSA Market

The market closed up by 0.15% at 11,634.4.

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	0.942	0.21	-0.74	-5.62	-5.62	10.39	1.81	14.24	3.54	8.24
KFH	0.711	-0.14	-1.11	-3.41	-3.41	2.93	2.15	16.55	2.87	13.14
ZAIN	0.477	1.27	1.71	-0.62	-0.62	1.71	1.68	9.97	7.34	2.06
BOUBYAN BANK	0.647	1.25	3.19	-0.97	-0.97	21.10	2.56	29.94	1.47	2.85
AGILITY	0.240	0.00	1.27	-4.76	-4.76	-2.83	0.60	9.64	8.33	0.64
Saudi Arabia										
ARAMCO	25.65	-0.58	-1.35	-4.11	-4.11	-8.56	4.25	15.75	6.92	6,207.30
SABIC	61.70	0.65	1.82	-3.14	-3.14	-7.91	1.18	88.31	5.51	185.10
STC	47.15	0.64	3.51	3.97	3.97	17.88	2.63	21.95	3.71	235.75
AL-RAJHI BANK	98.10	0.51	0.51	-3.82	-3.82	3.70	3.19	21.00	2.76	392.40
NCB	34.35	1.48	1.93	-4.18	-4.18	2.84	1.06	10.00	5.53	206.10
Abu Dhabi										
ETISALAT.AD	17.34	2.00	3.96	2.60	2.60	6.25	3.31	14.02	4.79	150.80
FAB.AD	13.64	-1.16	2.87	-1.30	-1.30	-0.73	1.15	9.23	5.50	150.60
EMIRATES NBD	19.45	-2.02	1.04	-3.71	-3.71	-9.32	0.98	5.46	5.14	122.86
DB ISLAMIC DB	7.47	0.13	3.46	4.18	4.18	5.36	1.08	7.19	6.02	54.09
EMAR.DU	12.30	-1.20	2.07	-7.87	-7.87	-4.28	1.27	8.04	8.13	108.72
Qatar										
QNB	16.030	0.19	1.84	-0.43	-0.43	-7.29	1.30	9.42	4.37	148.30
INDUSTREIS QAT	12.540	-0.16	0.80	-2.72	-2.72	-5.50	2.01	16.90	5.90	75.99
QA ISLAMIC BK	20.600	-0.96	0.98	0.15	0.15	-3.56	1.56	11.10	3.88	48.75
MASRAF AL RAYA	2.206	-0.09	0.09	-1.96	-1.96	-10.43	0.82	14.04	4.53	20.55
MESAIEED PETRO	1.395	-0.07	0.50	-2.99	-2.99	-6.69	1.07	24.38	4.09	17.55
Oman										
BANK MUSCAT	0.253	0.00	1.20	0.00	0.00	0.40	0.78	9.40	6.52	1.90
OMANTEL	0.815	-0.12	0.49	-4.12	-4.12	-13.30	0.92	7.92	6.75	0.61
BANK DHOFAR	0.145	0.69	0.69	1.45	1.45	-5.70	0.59	13.24	4.45	0.44
NAT BANK OF OMAN	0.285	1.79	1.79	-1.72	-1.72	-3.72	0.60	9.21	3.30	0.46
OMINVEST	0.230	0.88	2.22	-5.29	-5.29	-2.42	0.67	7.92	6.21	0.22

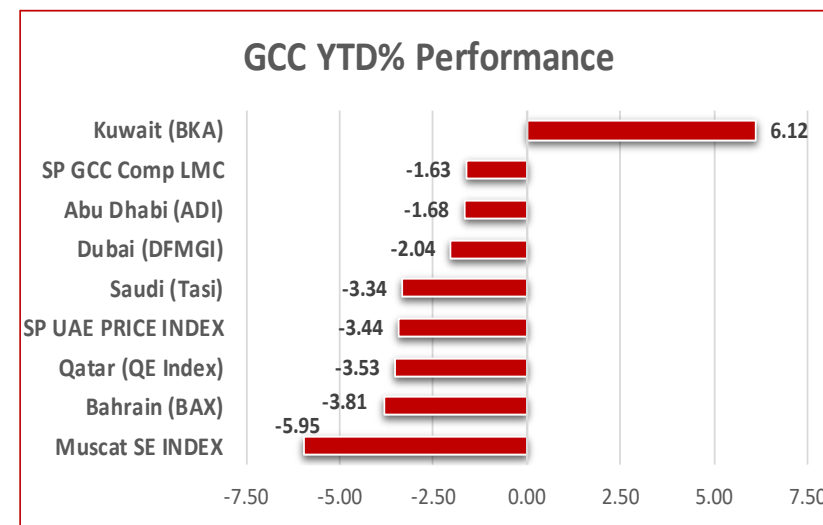
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
02-April. 25	25.97%	15.64%	0.06%	5.62%	9.48%	18.11%	13.65%	6.87%	7.30%
09-April. 25	26.05%	15.12%	0.06%	5.76%	9.60%	18.13%	13.63%	6.84%	7.55%

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 by 0.10%, the best performing sector today is technology at 2.68%.

KSA

Aramco closed at -0.58%, Sabic closed at 0.65%, STC closed at 0.64% and Al-Rajhi closed at 0.51%.

UAE

ETISALAT.AD had closed today at 2.0%, FAB.AD closed at -1.16%.



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