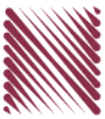


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 17th March 2025



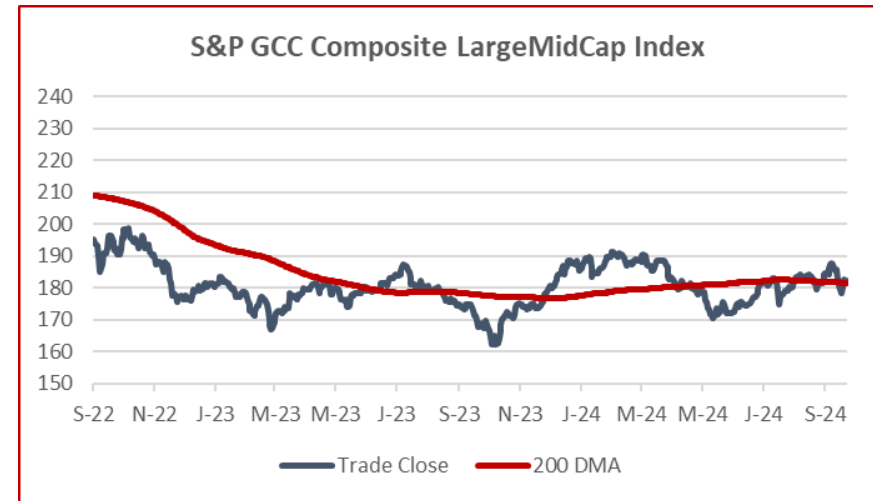


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,853.8	1.09	1.09	-2.13	-1.52	-1.52	2.16	17.70	3.53	9,676.10
Qatar (QE Index)	10,421.8	-0.01	-0.01	-0.23	-1.41	-1.41	1.18	11.34	4.75	524.67
Dubai (DFMGI)	5,140.6	-0.85	-1.57	-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)	1,969.0	-0.17	-0.17	0.45	-0.85	-0.85	0.88	8.88	5.01	7.49
Muscat SE INDEX	4,381.9	-0.13	-0.13	-1.22	-4.25	-4.25	0.77	9.03	6.53	7.04
SP GCC Comp LMC	188.6	0.54	0.54	-1.70	0.37	0.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.3	0.00	0.00	-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	7,880.3	-0.35	-0.35	-2.73	7.03	7.03	1.62	14.82	3.50	47.64
Kuwait Premier Index	8,426.0	-0.59	-0.59	-3.07	7.49	7.49	1.75	16.13	3.38	39.08
Kuwait Main Index	7,253.9	0.76	0.76	-1.10	5.02	5.02	1.19	10.45	4.10	8.56
Kuwait Sector										
Banking	1,984.5	-0.69	-0.69	-2.19	9.65	9.65	1.95	16.07	2.96	29.94
Telecom	1,028.1	-0.37	-0.37	-3.82	1.02	1.02	1.55	10.90	8.15	3.15
Industrials	737.1	0.74	0.74	-3.38	1.86	1.86	0.84	13.00	5.82	2.48
Financial Services	1,500.5	-0.52	-0.52	-4.35	-0.67	-0.67	1.21	12.34	2.79	5.04
Real Estate	1,499.5	0.27	0.27	-4.04	10.82	10.82	1.12	16.91	1.92	3.19
Basic Materials	868.5	0.26	0.26	-6.80	-4.69	-4.69	1.56	10.67	10.11	0.49
Health Care	569.1	5.65	5.65	9.59	24.18	24.18	1.80	18.21	1.95	
Consumer Staples	999.4	-0.14	-0.14	-3.57	0.07	0.07	2.02	20.32	2.05	0.30
Insurance	2,078.4	-0.16	-0.16	0.66	1.12	1.12	1.08	10.51	3.93	0.84
Consumer Discretionary	2,247.1	2.52	2.52	-3.30	5.86	5.86				
Energy	1,319.2	0.07	0.07	-3.33	10.93	10.93	1.09	10.13	4.82	0.27
Technology	1,142.2	-2.48	-2.48	-29.28	9.79	9.79	1.36			0.02
Utilities	400.0	-0.65	-0.65	-1.93	0.66	0.66				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices opened about 1% higher on Monday after the United States vowed to keep attacking Yemen's Houthis until the Iran-aligned group ends its assaults on shipping. Brent futures rose 72 cents or 1.02%, to \$71.30 a barrel by 0015 GMT, while U.S. West Texas Intermediate crude futures also rose 72 cents, or 1.1%, to \$67.90 a barrel.

Kuwait Market

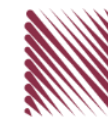
The market closed down by -0.35% at 7,880.3 value traded 77.0 million KD, Premier market value reached 46.6 million KD, closed down by -0.59% at 8,426.0

KSA Market

The market closed up by 1.09% at 11,853.8

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	1.016	-0.78	-0.78	-1.36	13.39	13.39	1.86	14.63	3.44	8.46
KFH	0.778	-0.77	-0.77	-2.87	4.29	4.29	2.18	16.77	2.83	13.31
ZAIN	0.468	0.00	0.00	-4.68	-0.21	-0.21	1.65	9.78	7.48	2.02
BOUBYAN BANK	0.646	-0.92	-0.92	-3.58	15.15	15.15	2.55	29.89	1.55	2.71
AGILITY	0.250	-1.57	-1.57	-8.42	1.21	1.21	0.65	10.43	8.00	0.67
Saudi Arabia										
ARAMCO	26.05	0.39	0.39	-3.87	-7.13	-7.13	4.32	16.00	6.82	6,305.95
SABIC	64.50	1.90	1.90	4.03	-3.73	-3.73	1.23	92.32	5.27	193.56
STC	44.00	0.69	0.69	-2.76	10.00	10.00	2.45	20.48	3.98	220.06
AL-RAJHI BANK	101.80	0.59	0.59	2.00	7.61	7.61	3.31	21.79	2.36	407.32
NCB	34.65	0.43	0.43	-1.00	3.74	3.74	1.07	10.08	5.48	207.96
Abu Dhabi										
ETISALAT.AD	17.44	1.40	4.43	4.56	6.86	6.86	3.33	14.11	4.67	149.93
FAB.AD	14.10	1.15	-1.67	-0.98	2.62	2.62	1.19	9.54	5.32	156.78
EMIRATES NBD	20.20	0.25	-2.88	-8.60	-5.83	-5.83	1.01	5.68	4.95	128.23
DB ISLAMIC DB	7.55	0.00	1.34	-2.33	6.49	6.49	1.10	7.26	5.96	54.81
EMAR.DU	13.10	-2.24	-4.38	-3.32	1.95	1.95	1.36	8.57	7.63	116.67
Qatar										
QNB	16.380	-0.12	-0.12	-1.33	-5.26	-5.26	1.34	9.71	4.27	151.29
INDUSTREIS QAT	13.230	0.30	0.30	0.00	-0.30	-0.30	2.12	17.83	5.59	80.04
QA ISLAMIC BK	21.100	0.14	0.14	1.30	-1.22	-1.22	1.60	11.37	3.79	49.62
MASRAF AL RAYA	2.300	0.17	0.17	-0.86	-6.62	-6.62	0.85	14.64	4.35	21.39
MESAIEED PETRO	1.388	-0.14	-0.14	-2.87	-7.16	-7.16	1.07	24.26	4.11	17.40
Oman										
BANK MUSCAT	0.254	-0.39	-0.39	0.00	0.79	0.79	0.78	9.44	6.50	1.91
OMANTEL	0.805	0.12	0.12	-2.07	-14.36	-14.36	0.91	7.82	6.83	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	0.00	0.00	7.14	1.35	1.35	0.64	9.69	3.13	0.49
OMINVEST	0.328	-0.61	-0.61	-1.80	-0.61	-0.61	0.68	8.06	6.10	0.22

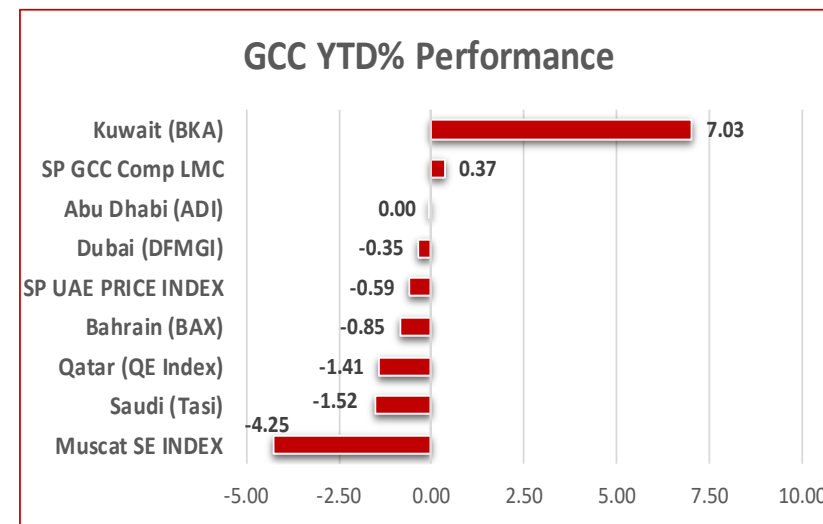
* GCC Markets performance at the latest close.

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 -0.35%, the worst performing sector today is technology at -2.48%.

KSA

Aramco closed today at 0.39%, Sabc closed at 1.90%, STC closed at 0.69%, and Al Rajhi closed at 0.59%.

UAE

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



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