



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 19th March 2025



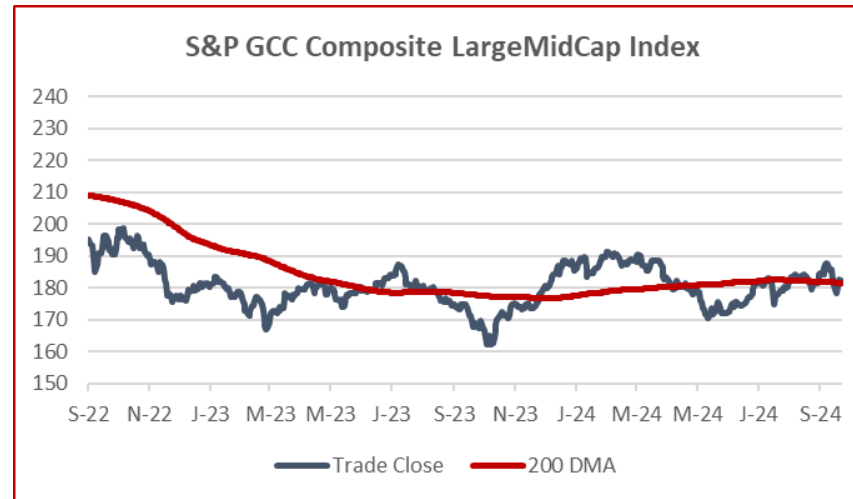


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,792.4	-0.76	0.57	-2.64	-2.03	-2.03	2.15	16.74	3.54	9,554.42
Qatar (QE Index)	10,461.5	0.55	0.37	0.15	-1.04	-1.04	1.18	11.38	4.73	526.35
Dubai (DFMGI)	5,149.1	-0.43	0.17	-3.17	-0.18	-0.18	1.65	9.83	5.43	763.23
Abu Dhabi (ADI)	9,463.5	0.13	0.48	-1.06	0.47	0.47	2.39	18.34	2.32	2,666.23
Bahrain (BAX)	1,970.0	0.11	-0.12	0.50	-0.80	-0.80	0.88	8.89	5.01	7.49
Muscat SE INDEX	4,362.0	-0.40	-0.58	-1.66	-4.69	-4.69	0.77	9.01	6.54	7.02
SP GCC Comp LMC	189.5	0.00	1.05	-1.20	0.87	0.87	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	152.7	0.00	0.88	-2.38	0.28	0.28				

Developed Markets										
MSCI World Index	3,672.6	-0.67	0.19	-3.49	-0.95	-0.95				
U.S. (S&P 500)	5,614.7	-1.07	-0.43	-5.71	-4.54	-4.54	4.42	25.39	1.61	50,518.75
U.K. (FTSE 100)	8,705.2	0.29	0.84	-1.19	6.51	6.51	1.79	16.63	3.54	2,245.61
Japan (topix)	2,783.6	1.29	2.49	3.78	-0.05	-0.05	1.45	14.09	2.25	967,301.73
Emerging Markets										
MSCI EM Index	1,145.2	1.21	2.28	4.37	6.48	6.48				
China (SSE Composite)	3,429.8	0.11	0.30	3.28	2.33	2.33	1.36	12.00		44,025.04
India (Sensex)	75,301.3	1.53	1.99	2.87	-3.63	-3.63	4.08	21.23	1.19	147,257.73

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,905.9	0.37	-0.03	-2.41	7.38	7.38	1.61	14.77	3.51	47.45
Kuwait Premier Index	8,469.5	0.47	-0.08	-2.57	8.05	8.05	1.74	16.05	3.36	38.86
Kuwait Main Index	7,213.5	-0.08	0.20	-1.65	4.43	4.43	1.19	10.50	4.23	8.59
Kuwait Sector										
Banking	1,995.3	0.50	-0.15	-1.66	10.25	10.25	1.94	15.97	2.98	29.75
Telecom	1,027.7	-0.14	-0.41	-3.86	0.98	0.98	1.54	10.87	8.17	3.14
Industrials	737.7	-0.09	0.82	-3.30	1.94	1.94	0.84	13.18	5.77	2.50
Financial Services	1,498.3	0.45	-0.66	-4.49	-0.81	-0.81	1.20	12.22	2.75	4.98
Real Estate	1,500.0	0.40	0.31	-4.01	10.85	10.85	1.12	16.90	1.93	3.18
Basic Materials	891.5	0.93	2.92	-4.34	-2.17	-2.17	1.59	10.88	9.92	0.50
Health Care	568.8	-0.06	5.59	9.53	24.11	24.11	1.90	19.23	1.84	
Consumer Staples	953.5	-3.40	-4.72	-8.00	-4.52	-4.52	2.00	20.04	2.08	0.30
Insurance	2,074.0	-0.43	-0.37	0.45	0.91	0.91	1.09	10.52	3.93	0.84
Consumer Discretionary	2,247.2	0.45	2.52	-3.29	5.86	5.86				
Energy	1,318.5	-0.16	0.02	-3.37	10.88	10.88	1.10	10.10	5.53	0.27
Technology	1,098.5	0.67	-6.21	-31.98	5.59	5.59	1.27			0.02
Utilities	405.3	1.32	0.65	-0.64	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slid on Wednesday after Russia agreed to U.S. President Donald Trump's proposal that Moscow and Kyiv stop attacking each other's energy infrastructure temporarily, which could lead to more Russian oil entering global markets.

Kuwait Market

The market closed up by 0.37% at 7,905.9 value traded 58.7 million KD, Premier market value reached 42.3 million KD, closed up by 0.47% at 8,469.5

KSA Market

The market closed down by -0.76% at 11,792.4

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	1.030	0.98	0.59	0.00	14.96	14.96	1.88	14.83	3.40	8.57
KFH	0.778	0.39	-0.77	-2.87	4.29	4.29	2.18	16.77	2.83	13.31
ZAIN	0.465	0.00	-0.64	-5.30	-0.85	-0.85	1.64	9.72	7.53	2.01
BOUBYAN BANK	0.664	2.00	1.84	-0.90	18.36	18.36	2.62	30.73	1.51	2.79
AGILITY	0.255	0.00	0.39	-6.59	3.24	3.24	0.67	10.64	7.84	0.68
Saudi Arabia										
ARAMCO	25.60	-1.35	-1.35	-5.54	-8.73	-8.73	4.25	15.72	6.94	6,193.71
SABIC	63.50	-1.85	0.32	2.42	-5.22	-5.22	1.21	90.89	5.35	190.45
STC	44.00	-1.12	0.69	-2.76	10.00	10.00	2.45	20.48	3.98	219.95
AL-RAJHI BANK	101.80	-0.59	0.59	2.00	7.61	7.61	3.31	21.79	2.36	407.10
NCB	35.20	-0.85	2.03	0.57	5.39	5.39	1.09	10.24	5.40	211.15
Abu Dhabi										
ETISALAT.AD	17.50	0.23	0.34	4.92	7.23	7.23	3.34	14.15	4.66	152.19
FAB.AD	14.24	-0.14	0.99	0.00	3.64	3.64	1.20	9.64	5.27	157.45
EMIRATES NBD	20.20	-0.74	0.00	-8.60	-5.83	-5.83	1.01	5.68	4.95	127.91
DB ISLAMIC DB	7.51	-0.13	-0.53	-2.85	5.92	5.92	1.09	7.23	5.99	54.45
EMAR.DU	13.35	-1.11	1.91	-1.48	3.89	3.89	1.38	8.73	7.49	118.44
Qatar										
QNB	16.370	0.31	-0.18	-1.39	-5.32	-5.32	1.34	9.71	4.28	152.22
INDUSTREIS QAT	13.270	0.15	0.61	0.30	0.00	0.00	2.13	17.88	5.58	80.28
QA ISLAMIC BK	20.850	0.00	-1.04	0.10	-2.39	-2.39	1.58	11.23	3.84	49.53
MASRAF AL RAYA	2.324	0.22	1.22	0.17	-5.64	-5.64	0.86	14.79	4.30	21.59
MESAIEED PETRO	1.416	0.50	1.87	-0.91	-5.28	-5.28	1.09	24.75	4.03	17.79
Oman										
BANK MUSCAT	0.255	-0.39	0.00	0.39	1.19	1.19	0.78	9.48	6.47	1.91
OMANTEL	0.823	0.86	2.36	0.12	-12.45	-12.45	0.93	8.00	6.68	0.62
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	0.290	-2.03	-3.33	3.57	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.327	0.00	-0.91	-2.10	-0.91	-0.91	0.68	8.04	6.12	0.22

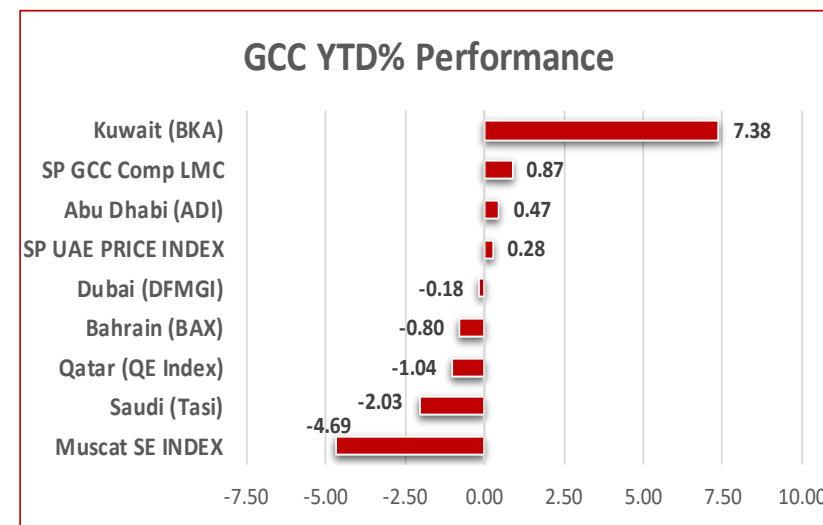
* GCC Markets performance at the latest close.

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 up today by 0.37 %, the best performing sector today is Utilities at -1.32%.

KSA

Aramco closed today at -1.35%, Sabic closed at -1.85%, STC closed at -1.12%, and Al Rajhi closed at -0.59%.

UAE

ETISALAT.AD had closed today at 0.23%, FAB.AD closed with a with a negative performance at -0.14%.



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