



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 1st June 2025



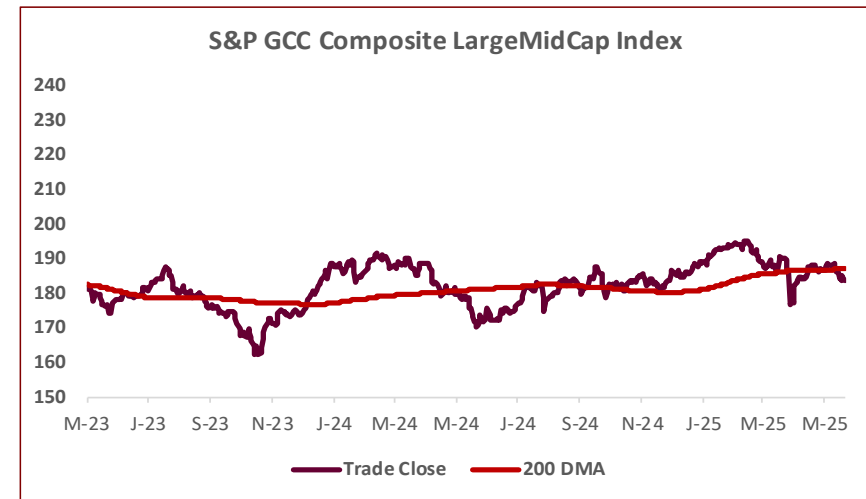


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,990.4	-0.56	-1.77	-5.84	-8.60	-8.69	2.00	15.48	3.89	9,205.58
Qatar (QE Index)	10,463.0	-0.72	-2.89	0.03	2.25	-1.02	1.23	11.67	4.63	561.45
Dubai (DFMGI)	5,480.5	-0.22	0.30	3.27	7.54	6.24	1.77	10.20	5.15	816.29
Abu Dhabi (ADI)	9,685.1	-0.62	0.20	1.58	3.38	2.83	2.05	14.79	2.99	2,732.77
Bahrain (BAX)	1,920.9	0.01	-0.08	0.46	-1.56	-3.27	0.84	8.46	5.25	7.46
Muscat SE INDEX	4,561.0	0.97	1.41	5.67	4.44	-0.34	0.81	9.44	6.24	7.40
SP GCC Comp LMC	183.5	-0.27	-1.41	-2.48	-3.51	-2.33	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.0	-0.97	-0.11	3.43	6.17	5.09				

Developed Markets										
MSCI World Index	3,863.5	0.03	1.60	5.69	6.47	4.20				
U.S. (S&P 500)	5,911.7	-0.01	1.88	6.15	5.34	0.51	4.52	25.84	1.57	52,756.93
U.K. (FTSE 100)	8,772.4	0.64	0.62	3.27	2.21	7.33	1.84	16.59	3.44	2,279.16
Japan (topix)	2,801.6	-0.37	2.41	5.03	5.37	0.60	1.43	14.40	2.41	970,802.17
Emerging Markets										
MSCI EM Index	1,157.3	-1.10	-1.16	4.00	5.08	7.61				
China (SSE Composite)	3,347.5	-0.47	-0.03	2.09	0.35	-0.13	1.36	12.00		44,025.04
India (Sensex)	81,451.0	-0.22	-0.33	1.51	5.21	4.24	4.38	23.31	1.19	158,682.97

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,112.5	-0.08	0.74	1.92	0.48	10.19	1.66	15.18	3.44	49.26
Kuwait Premier Index	8,799.1	-0.10	0.92	2.87	1.43	12.25	1.84	16.66	3.29	41.04
Kuwait Main Index	6,967.0	0.01	-0.17	-2.63	-4.14	0.87	1.11	10.10	4.22	8.22
Kuwait Sector										
Banking	2,036.0	-0.29	0.96	1.56	-0.40	12.50	1.96	16.46	3.02	30.94
Telecom	1,039.0	-0.19	-0.43	0.87	-1.03	2.09	1.56	10.06	7.30	3.18
Industrials	781.2	-0.14	1.44	3.82	4.86	7.96	1.21	15.72	4.85	2.65
Financial Services	1,516.9	0.08	0.96	2.55	0.57	0.42	1.18	13.04	3.31	5.06
Real Estate	1,643.2	-0.04	-0.19	3.28	8.31	21.44	1.15	17.45	1.79	3.49
Basic Materials	915.8	0.60	0.57	0.57	1.88	0.50	1.68	13.31	8.08	0.52
Health Care	572.2	16.51	-0.21	-1.44	0.29	24.86	1.93		1.83	
Consumer Staples	1,219.2	9.09	10.08	16.15	23.52	22.08	2.55	22.11	2.11	0.37
Insurance	1,851.6	0.49	1.44	2.29	-13.16	-9.91	0.94	9.42	3.49	0.75
Consumer Discretionary	2,336.6	-0.75	-2.11	0.72	-1.01	10.07				
Energy	1,481.4	-2.85	-2.72	6.87	11.80	24.57	1.20	9.74	5.25	0.30
Technology	1,091.3	-2.60	-1.32	-3.23	1.35	4.90	1.27			0.02
Utilities	376.3	-0.69	-1.38	-3.38	-7.14	-5.30				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

The world's largest group of oil producers, OPEC+, stuck to its guns on Saturday with another big increase of 411,000 barrels per day for July as it looks to wrestle back market share and punish over-producers. Having spent years curbing production — more than 5 million barrels a day (bpd) or 5% of world demand — eight OPEC+ countries made a modest output increase in April before tripling it for May, June, and now July. U.S. crude futures fell Friday due to fears that OPEC+ would boost oil output for July beyond previous forecasts. Brent crude futures were down by 22 cents, or 0.34%, at \$63.93 a barrel.

Kuwait Market

The market closed down by 0.08% at 8,112.5 value traded 127.3 million KD, Premier market value reached 103.8 million KD, closed down by 0.10% at 8,799.1.

KSA Market

The market closed down at 0.56% at 10,990.4

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	0.956	-0.93	0.95	0.42	-4.22	12.03	1.87	14.77	3.49	8.36
KFH	0.750	0.00	1.08	3.73	1.89	8.58	2.15	17.35	2.72	13.86
ZAIN	0.477	-0.42	-0.83	0.85	-0.62	1.71	1.62	9.12	7.34	2.06
BOUBYAN BANK	0.672	-0.59	0.00	-1.03	2.86	25.78	2.84	32.53	1.42	2.96
AGILITY	0.250	-1.19	-1.57	-4.94	-0.79	1.21	0.65	11.25	4.00	0.67
Saudi Arabia										
ARAMCO	25.00	-1.77	-0.60	-1.38	-6.54	-10.87	4.10	15.66	6.50	6,050.00
SABIC	55.70	-1.59	-5.27	-8.69	-12.56	-16.87	1.07	662.46	6.10	167.10
STC	41.90	-0.83	-1.64	-7.97	-3.41	9.51	2.29	18.50	4.53	209.50
AL-RAJHI BANK	91.10	-2.25	-3.09	-6.47	-10.69	-3.70	2.72	18.09	2.97	364.40
NCB	34.70	0.43	-2.25	-2.80	-3.21	3.89	1.07	9.70	5.48	208.20
Abu Dhabi										
ETISALAT.AD	17.24	-0.35	-0.58	-1.26	1.66	5.27	2.93	10.84	4.83	149.41
FAB.AD	16.62	-3.13	0.50	7.19	16.50	17.18	1.40	10.27	4.66	177.87
EMIRATES NBD	22.40	-2.40	-2.61	9.00	10.89	4.43	1.12	6.44	4.46	141.49
DB ISLAMIC DB	8.25	-0.12	3.25	9.13	15.06	16.36	1.31	7.79	5.45	59.74
EMAR.DU	13.15	-1.13	-2.95	0.38	-1.50	2.33	1.45	8.13	7.60	116.23
Qatar										
QNB	16.950	-0.59	-2.87	1.50	5.28	-1.97	1.37	9.96	4.13	156.56
INDUSTREIS QAT	11.850	-2.23	-4.44	-5.65	-8.07	-10.70	1.98	17.06	6.24	71.69
QA ISLAMIC BK	21.100	-1.86	-6.18	-0.05	2.58	-1.22	1.62	11.27	3.79	49.86
MASRAF AL RAYA	2.238	-1.37	-4.56	0.27	-0.53	-9.14	0.85	14.23	4.47	20.81
MESAIEED PETRO	1.334	-2.84	-4.44	-5.39	-7.23	-10.77	1.04	23.57	4.27	16.76
Oman										
BANK MUSCAT	0.274	0.00	-0.36	7.45	8.30	8.73	0.86	9.97	6.02	2.06
OMANTEL	0.844	0.48	0.60	3.18	-0.71	-10.21	0.99	7.91	6.52	0.63
BANK DHOFAR	0.147	0.00	0.00	-1.34	2.85	-4.40	0.61	12.89	4.39	0.45
NAT BANK OF OMAN	0.292	2.46	-1.02	-1.02	0.69	-1.35	0.62	9.14	3.22	0.47
OMINVEST	0.220	0.00	-1.79	1.38	-9.41	-6.67	0.67	7.06	6.49	0.21

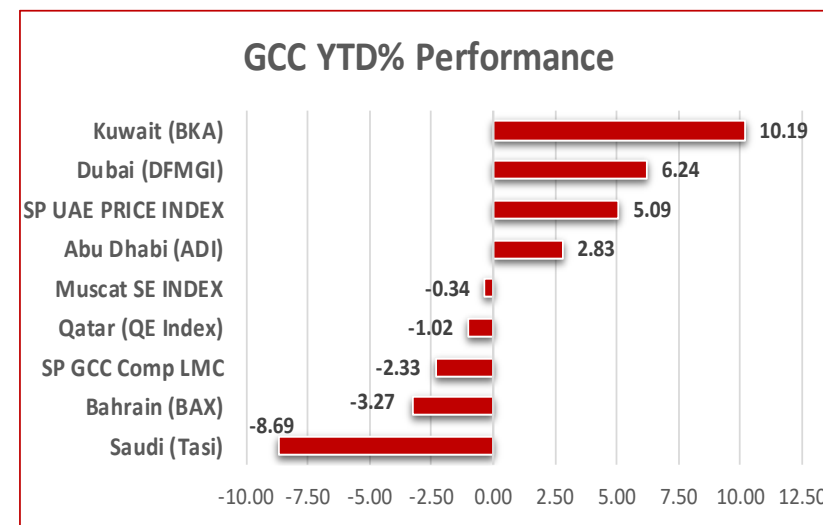
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
21-May. 25	26.74%	14.34%	0.07%	6.22%	9.09%	18.06%	13.84%	6.94%	7.44%
28-May. 25	26.78%	14.20%	0.07%	6.44%	8.96%	18.01%	13.94%	6.92%	7.46%

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 0.08%, the worst performing sector today is Energy at - 2.85%.

KSA

Aramco closed at -1.77%, Sabic closed at -1.59%. STC closed at -0.83% and Al-Rajhi closed at -2.25%.

UAE

ETISALAT.AD closed at -0.35%, FAB.AD closed at -3.13%.



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