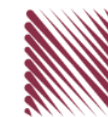


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 20th April 2025



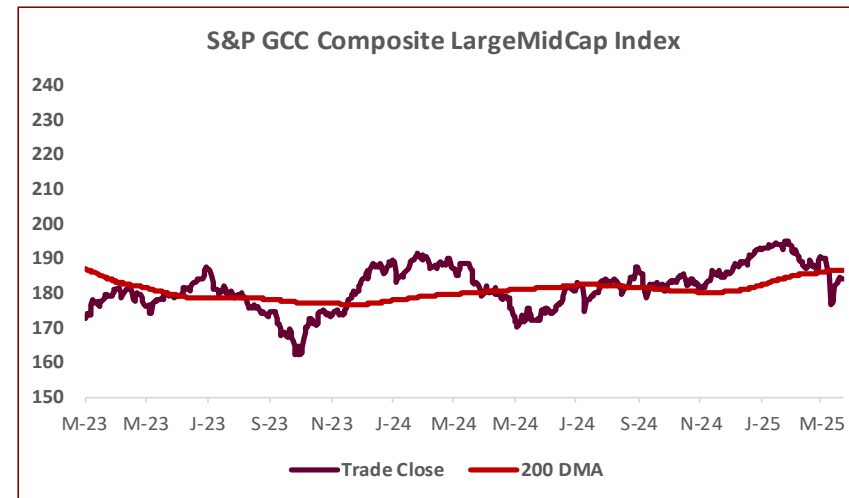


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,553.0	-0.70	0.44	-3.93	-3.93	-4.02	2.09	16.25	3.74	9,481.72
Qatar (QE Index)	10,135.8	-0.61	0.40	-0.95	-0.95	-4.12	1.15	11.05	4.88	512.19
Dubai (DFMGI)	5,096.9	0.70	2.64	0.01	0.01	-1.20	1.64	9.71	5.55	755.97
Abu Dhabi (ADI)	9,277.7	0.20	1.31	-0.97	-0.97	-1.50	1.93	14.59	3.18	2,615.70
Bahrain (BAX)	1,902.1	-0.43	0.02	-2.52	-2.52	-4.22	0.85	8.52	5.23	7.39
Muscat SE INDEX	4,305.1	0.01	0.81	-1.42	-1.42	-5.93	0.76	8.91	6.64	6.96
SP GCC Comp LMC	184.3	0.10	0.95	-3.11	-3.11	-1.93	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	147.4	0.45	2.52	-2.20	-2.20	-3.19				

Developed Markets										
MSCI World Index	3,476.1	0.06	0.14	-4.20	-4.20	-6.25				
U.S. (S&P 500)	5,282.7	0.00	-1.50	-5.87	-5.87	-10.18	4.10	23.37	1.75	47,134.46
U.K. (FTSE 100)	8,275.7	0.00	3.91	-3.58	-3.58	1.26	1.74	15.80	3.70	2,155.21
Japan (topix)	2,559.2	1.14	3.74	-3.75	-3.75	-8.11	1.32	12.97	2.46	895,011.45
Emerging Markets										
MSCI EM Index	1,068.6	0.14	2.24	-2.98	-2.98	-0.64				
China (SSE Composite)	3,276.7	-0.11	1.19	-1.77	-1.77	-2.24	1.36	12.00		44,025.04
India (Sensex)	78,553.2	1.96	4.52	1.47	1.47	0.53	4.26	22.18	1.14	153,175.67

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,869.0	0.71	0.63	-2.54	-2.54	6.88	1.64	14.88	3.55	47.85
Kuwait Premier Index	8,419.6	0.64	0.49	-2.94	-2.94	7.41	1.80	16.15	3.43	39.27
Kuwait Main Index	7,220.0	1.05	1.26	-0.65	-0.65	4.53	1.15	10.60	4.16	8.58
Kuwait Sector										
Banking	1,989.6	0.76	0.41	-2.67	-2.67	9.93	1.97	16.09	3.08	30.27
Telecom	1,029.1	0.75	-0.82	-1.97	-1.97	1.12	1.55	10.86	7.37	3.14
Industrials	731.4	0.47	0.85	-1.83	-1.83	1.07	1.09	13.16	5.98	2.48
Financial Services	1,470.3	0.76	2.55	-2.52	-2.52	-2.67	1.14	12.63	2.88	4.91
Real Estate	1,513.7	0.23	2.08	-0.22	-0.22	11.87	1.06	17.26	1.94	3.21
Basic Materials	871.8	0.71	-1.16	-3.02	-3.02	-4.33	1.55	10.67	10.05	0.49
Health Care	570.3	0.00	-0.05	-0.05	-0.05	24.44	1.96	22.48	1.84	
Consumer Staples	899.7	-1.32	-0.61	-8.85	-8.85	-9.92	1.88	17.25	2.86	0.27
Insurance	1,954.2	2.02	-4.79	-8.35	-8.35	-4.92	0.99	9.52	3.81	0.79
Consumer Discretionary	2,294.2	0.76	2.53	-2.81	-2.81	8.07				
Energy	1,271.8	0.28	-1.13	-4.01	-4.01	6.95	1.03	9.00	5.74	0.26
Technology	1,149.5	3.27	8.97	6.76	6.76	10.49	1.34			0.02
Utilities	392.1	0.68	1.36	-3.24	-3.24	-1.32				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose more than 3% on Thursday after the United States imposed new sanctions to curb Iranian oil exports, elevating supply concerns. Brent crude futures rose \$2.11, or 3.2%, to close at \$67.96 a barrel, and U.S. West Texas Intermediate crude settled at \$64.68 a barrel, up \$2.21, or 3.54%.

Kuwait Market

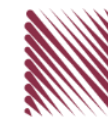
The market closed up by 0.71% at 7,869.0 value traded 86.0 million KD, Premier market value reached 63.5 million KD, closed up by 0.64% at 8,419.6.

KSA Market

The market closed down by -0.70% at 11,553.0.

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	0.955	1.38	0.63	-4.32	-4.32	11.91	1.83	14.44	3.49	8.35
KFH	0.714	0.42	-0.70	-3.00	-3.00	3.37	2.16	16.62	2.85	13.19
ZAIN	0.482	1.05	2.77	0.42	0.42	2.77	1.70	10.08	7.26	2.09
BOUBYAN BANK	0.643	-0.62	2.55	-1.58	-1.58	20.35	2.54	29.75	1.48	2.84
AGILITY	0.248	3.33	4.64	-1.59	-1.59	0.40	0.62	9.96	8.06	0.66
Saudi Arabia										
ARAMCO	25.45	-0.78	-2.12	-4.86	-4.86	-9.27	4.22	15.63	6.98	6,158.90
SABIC	61.30	-0.65	1.16	-3.77	-3.77	-8.51	1.17	87.74	5.55	183.90
STC	46.70	-0.95	2.52	2.98	2.98	16.75	2.60	21.74	3.75	233.50
AL-RAJHI BANK	97.60	-0.51	0.00	-4.31	-4.31	3.17	3.17	20.89	2.78	390.40
NCB	34.05	-0.87	1.04	-5.02	-5.02	1.95	1.05	9.91	5.58	204.30
Abu Dhabi										
ETISALAT.AD	17.36	-0.12	3.96	2.60	2.60	6.25	3.31	14.02	4.79	150.80
FAB.AD	13.62	0.00	2.71	-1.45	-1.45	-0.87	1.15	9.22	5.51	150.38
EMIRATES NBD	19.45	0.78	1.04	-3.71	-3.71	-9.32	0.98	5.46	5.14	122.86
DB ISLAMIC DB	7.49	0.54	3.74	4.46	4.46	5.64	1.09	7.21	6.01	54.23
EMAR.DU	12.15	0.00	0.83	-8.99	-8.99	-5.45	1.26	7.95	8.23	107.39
Qatar										
QNB	15.960	-0.44	1.40	-0.87	-0.87	-7.69	1.29	9.38	4.39	147.41
INDUSTREIS QAT	12.570	0.24	1.05	-2.48	-2.48	-5.28	2.01	16.94	5.89	76.05
QA ISLAMIC BK	20.020	-2.82	-1.86	-2.67	-2.67	-6.27	1.52	10.76	4.00	47.31
MASRAF AL RAYA	2.195	-0.50	-0.41	-2.44	-2.44	-10.88	0.81	13.97	4.56	20.41
MESAIEED PETRO	1.390	-0.36	0.14	-3.34	-3.34	-7.02	1.07	24.30	4.10	17.46
Oman										
BANK MUSCAT	0.253	0.00	1.20	0.00	0.00	0.40	0.78	9.40	6.52	1.90
OMANTEL	0.816	0.12	0.62	-4.00	-4.00	-13.19	0.92	7.93	6.74	0.61
BANK DHOFAR	0.146	0.69	1.39	2.15	2.15	-5.05	0.59	13.33	4.42	0.44
NAT BANK OF OMAN	0.290	1.75	3.57	0.00	0.00	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.230	0.00	2.22	-5.29	-5.29	-2.42	0.67	7.92	6.21	0.22

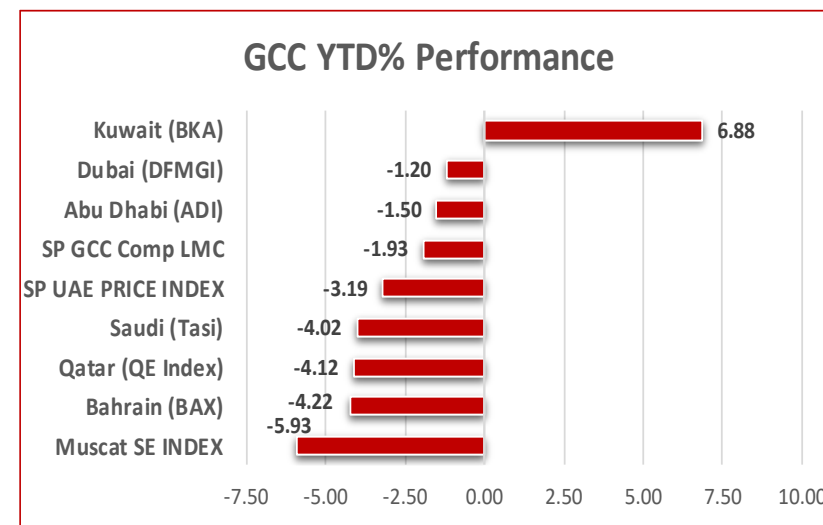
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
09-April. 25	26.05%	15.12%	0.06%	5.76%	9.60%	18.13%	13.63%	6.84%	7.55%
16-April. 25	26.09%	14.61%	0.06%	5.76%	9.30%	18.08%	13.62%	6.87%	7.51%

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 0.71%, the best performing sector today is technology at 3.27%.

KSA

Aramco closed at -0.78%, Sabic closed at -0.65%, STC closed at -0.95% and Al-Rajhi closed at -0.51%.

UAE

ETISALAT.AD had closed today at -0.12%, FAB.AD closed flat at 0%.



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