

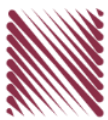


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 20th May 2025



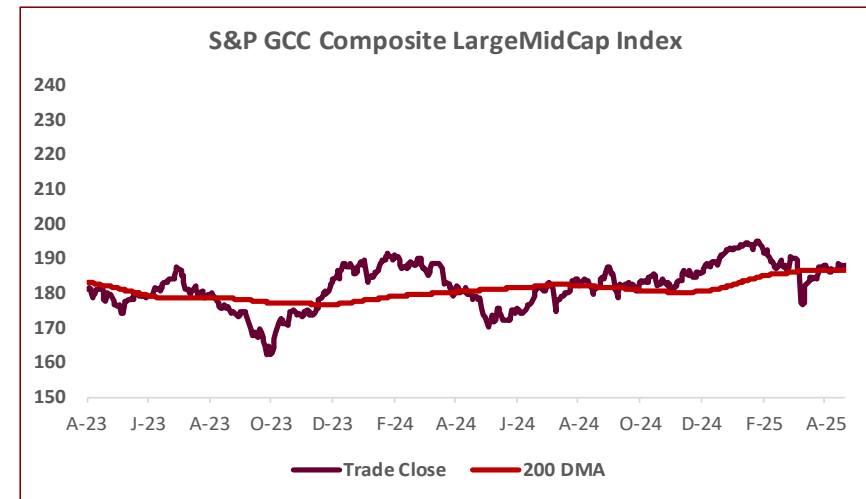


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,405.3	-0.29	-0.69	-2.28	-5.15	-5.24	2.07	15.60	3.75	9,616.17
Qatar (QE Index)	10,710.1	0.65	1.28	2.39	4.66	1.31	1.22	11.71	4.60	541.20
Dubai (DFMGI)	5,491.3	0.66	0.66	3.47	7.75	6.45	1.78	10.28	5.12	822.61
Abu Dhabi (ADI)	9,665.7	0.12	0.12	1.38	3.17	2.62	2.04	14.77	3.00	2,713.10
Bahrain (BAX)	1,921.8	0.04	0.06	0.50	-1.51	-3.23	0.84	8.39	5.23	7.45
Muscat SE INDEX	4,452.2	0.37	0.95	3.15	1.95	-2.72	0.79	9.25	6.36	7.26
SP GCC Comp LMC	188.0	0.07	-0.21	-0.09	-1.15	0.06	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.4	0.49	0.49	3.67	6.42	5.34				

Developed Markets										
MSCI World Index	3,874.1	0.28	0.28	5.98	6.77	4.48				
U.S. (S&P 500)	5,963.6	0.09	0.09	7.08	6.27	1.39	4.55	26.11	1.57	53,113.77
U.K. (FTSE 100)	8,699.3	0.17	0.17	2.41	1.36	6.44	1.83	16.23	3.48	2,260.93
Japan (topix)	2,738.4	-0.08	-0.08	2.67	3.00	-1.67	1.40	14.05	2.45	953,585.88
Emerging Markets										
MSCI EM Index	1,166.6	-0.49	-0.49	4.83	5.92	8.48				
China (SSE Composite)	3,367.6	0.00	0.00	2.70	0.95	0.47	1.36	12.00		44,025.04
India (Sensex)	82,059.4	-0.33	-0.33	2.26	6.00	5.02	4.44	23.30	1.14	160,147.27

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,051.9	-0.31	-0.46	1.16	-0.27	9.36	1.65	15.04	3.47	49.08
Kuwait Premier Index	8,707.9	-0.31	-0.55	1.81	0.38	11.09	1.83	16.50	3.31	40.74
Kuwait Main Index	7,017.1	-0.34	0.04	-1.93	-3.45	1.59	1.10	10.15	4.29	8.33
Kuwait Sector										
Banking	2,011.6	-0.35	-0.52	0.35	-1.59	11.15	1.94	16.32	3.04	30.68
Telecom	1,045.7	-0.35	-1.05	1.51	-0.40	2.74	1.58	10.16	7.23	3.21
Industrials	769.8	-0.56	-0.30	2.30	3.32	6.38	1.15	14.90	4.86	2.62
Financial Services	1,515.8	-0.26	-0.39	2.47	0.50	0.35	1.18	12.79	3.33	5.07
Real Estate	1,646.8	-0.07	0.25	3.51	8.55	21.71	1.15	17.20	1.78	3.50
Basic Materials	905.3	0.13	-0.10	-0.57	0.72	-0.65	1.65	13.14	10.08	0.51
Health Care	538.8	-2.66	-4.65	-7.21	-5.58	17.56	1.90	21.81	1.89	
Consumer Staples	1,127.2	3.76	5.25	7.39	14.20	12.87	2.27	19.58	2.36	0.33
Insurance	1,899.3	-0.19	3.07	4.92	-10.92	-7.59	0.97	9.08	3.39	0.77
Consumer Discretionary	2,391.9	-1.11	-2.73	3.10	1.33	12.68				
Energy	1,514.3	2.02	2.52	9.25	14.29	27.34	1.20	9.77	4.92	0.30
Technology	1,164.0	3.90	0.63	3.23	8.11	11.89	1.30			0.02
Utilities	381.6	0.00	0.00	-2.03	-5.84	-3.97				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged up on Tuesday on a potential breakdown in talks between the U.S. and Iran over Tehran's nuclear program and the weakened prospects of more Iranian oil supplies entering the global market. Brent futures rose 12 cents to \$65.66 a barrel by 0008 GMT. U.S. West Texas Intermediate crude futures climbed 16 cents to \$62.85.

Kuwait Market

The market closed down by -0.31% at 8,051.9 value traded 87.9 million KD, Premier market value reached 59.8 million KD, closed down by -0.31% at 8,707.9.

KSA Market

The market closed at -0.29% at 11,405.3.

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	0.948	-0.11	-0.94	-0.42	-5.02	11.09	1.86	14.65	3.52	8.29
KFH	0.739	-0.14	-0.14	2.21	0.39	6.99	2.12	17.09	2.76	13.65
ZAIN	0.483	-0.41	-1.43	2.11	0.63	2.99	1.64	9.24	7.25	2.09
BOUBYAN BANK	0.676	-0.44	-0.29	-0.44	3.47	26.52	2.86	32.72	1.41	2.98
AGILITY	0.256	-1.16	-2.66	-2.66	1.59	3.64	0.64	10.28	3.91	0.68
Saudi Arabia										
ARAMCO	26.25	0.38	0.38	3.55	-1.87	-6.42	4.31	16.44	6.19	6,352.33
SABIC	59.30	-0.34	-1.66	-2.79	-6.91	-11.49	1.14	705.28	5.73	177.90
STC	43.15	0.47	-0.23	-5.23	-0.53	12.78	2.36	19.05	4.40	215.74
AL-RAJHI BANK	97.00	0.10	-0.82	-0.41	-4.90	2.54	2.90	19.27	2.79	387.99
NCB	35.55	1.14	0.14	-0.42	-0.84	6.44	1.09	9.93	5.34	213.29
Abu Dhabi										
ETISALAT.AD	17.22	-0.12	-0.12	-1.03	1.89	5.51	2.94	10.87	4.82	149.78
FAB.AD	15.98	0.76	0.76	6.39	15.63	16.30	1.39	10.19	4.69	176.56
EMIRATES NBD	23.40	3.54	3.54	13.87	15.84	9.09	1.17	6.73	4.27	147.83
DB ISLAMIC DB	8.03	1.77	1.77	6.22	11.99	13.26	1.28	7.58	5.60	58.15
EMAR.DU	13.45	0.75	0.75	2.67	0.75	4.67	1.48	8.31	7.43	118.90
Qatar										
QNB	17.350	1.05	0.87	3.89	7.76	0.35	1.41	10.19	4.03	159.87
INDUSTREIS QAT	12.350	1.31	1.65	-1.67	-4.19	-6.93	2.07	17.78	5.99	74.54
QA ISLAMIC BK	22.240	1.55	3.68	5.35	8.12	4.12	1.70	11.88	3.60	52.43
MASRAF AL RAYA	2.313	-0.73	0.57	3.63	2.80	-6.09	0.88	14.71	4.32	21.46
MESAIEED PETRO	1.387	-0.14	0.14	-1.63	-3.55	-7.22	1.08	24.51	4.11	17.38
Oman										
BANK MUSCAT	0.275	1.10	0.73	7.84	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.841	0.12	1.94	2.81	-1.06	-10.53	0.98	7.88	6.54	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	0.295	0.00	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.223	0.45	1.36	2.76	-8.18	-5.39	0.68	7.15	6.41	0.21

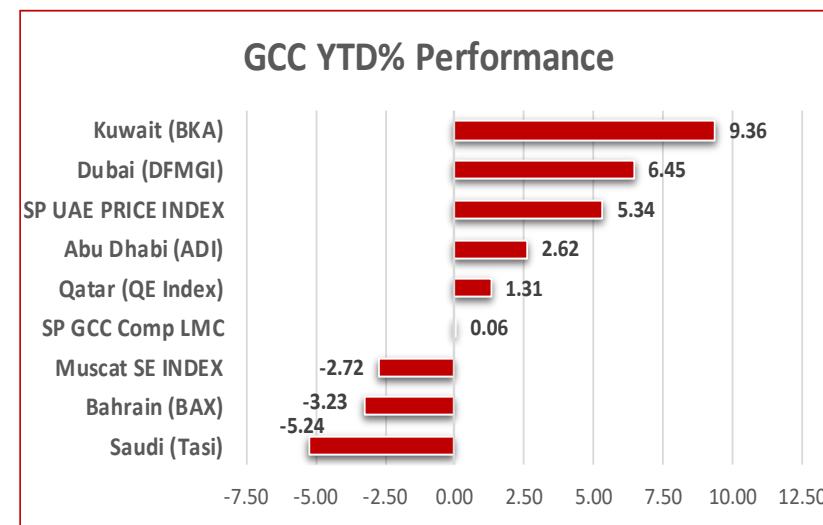
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
07-May. 25	26.53%	14.30%	0.07%	5.94%	8.94%	18.08%	13.74%	6.90%	7.16%
14-May. 25	26.66%	14.35%	0.07%	5.94%	9.17%	18.07%	13.79%	6.93%	7.43%

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 -0.31%, the lowest performing sector today is health care at -2.66%.

KSA

Aramco closed at 0.38%, Sabic closed at -0.34%. STC closed at 0.47% and Al-Rajhi closed at 0.10%.

UAE

ETISALAT.AD closed at -0.12%, FAB.AD closed at 0.76%.



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