



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 21th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

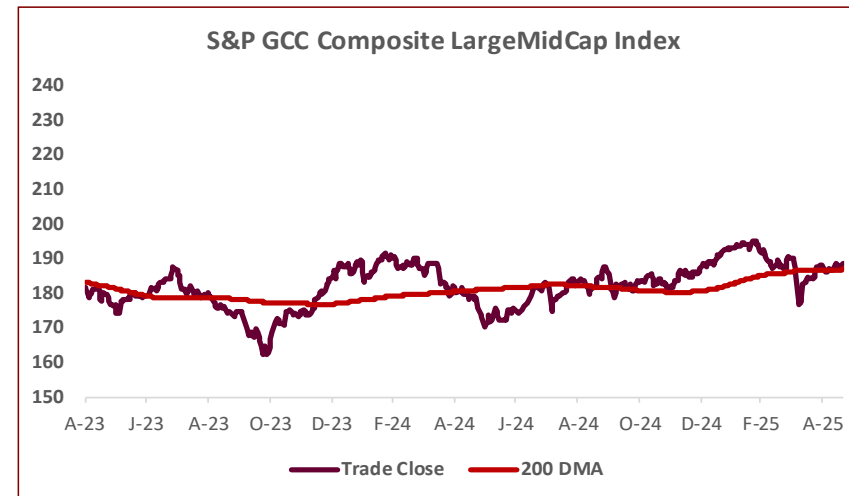


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,438.2	0.29	-0.41	-2.00	-4.88	-4.97	2.07	15.66	3.74	9,618.21
Qatar (QE Index)	10,763.3	0.50	1.78	2.90	5.18	1.82	1.22	11.76	4.58	543.26
Dubai (DFMGI)	5,467.3	-0.44	0.22	3.02	7.28	5.98	1.77	10.22	5.15	816.81
Abu Dhabi (ADI)	9,707.0	0.43	0.55	1.81	3.61	3.06	2.05	14.85	2.99	2,719.72
Bahrain (BAX)	1,922.0	0.01	0.06	0.51	-1.50	-3.22	0.84	8.43	5.23	7.46
Muscat SE INDEX	4,457.3	0.11	1.07	3.27	2.07	-2.61	0.79	9.26	6.36	7.26
SP GCC Comp LMC	188.6	0.31	0.09	0.22	-0.85	0.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.8	0.27	0.76	3.95	6.70	5.62				

Developed Markets										
MSCI World Index	3,870.0	-0.11	0.17	5.87	6.65	4.37				
U.S. (S&P 500)	5,940.5	-0.39	-0.30	6.67	5.86	1.00	4.55	26.13	1.57	53,152.64
U.K. (FTSE 100)	8,781.1	0.94	1.11	3.37	2.31	7.44	1.85	16.45	3.43	2,281.98
Japan (topix)	2,738.8	0.02	-0.06	2.68	3.01	-1.65	1.40	14.08	2.46	952,965.69
Emerging Markets										
MSCI EM Index	1,167.5	0.07	-0.42	4.91	6.00	8.55				
China (SSE Composite)	3,380.5	0.38	0.39	3.09	1.34	0.86	1.36	12.00		44,025.04
India (Sensex)	81,186.4	-1.06	-1.39	1.18	4.87	3.90	4.40	23.05	1.16	158,370.72

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,043.1	-0.11	-0.56	1.05	-0.38	9.24	1.64	14.98	3.48	48.90
Kuwait Premier Index	8,701.3	-0.08	-0.63	1.73	0.31	11.00	1.82	16.43	3.32	40.62
Kuwait Main Index	6,998.0	-0.27	-0.23	-2.19	-3.71	1.31	1.10	10.12	4.30	8.28
Kuwait Sector										
Banking	2,009.9	-0.09	-0.60	0.26	-1.67	11.06	1.93	16.27	3.05	30.57
Telecom	1,039.9	-0.55	-1.60	0.95	-0.95	2.18	1.57	10.13	7.25	3.20
Industrials	767.4	-0.32	-0.62	1.98	3.00	6.04	1.14	14.82	4.92	2.61
Financial Services	1,522.6	0.44	0.05	2.93	0.94	0.79	1.18	12.67	3.31	5.06
Real Estate	1,645.8	-0.06	0.19	3.44	8.48	21.63	1.15	17.19	1.78	3.50
Basic Materials	904.6	-0.08	-0.19	-0.66	0.63	-0.73	1.66	13.16	10.07	0.51
Health Care	523.1	-2.91	-7.43	-9.91	-8.33	14.13	1.85	21.23	1.95	
Consumer Staples	1,095.4	-2.83	2.28	4.35	10.97	9.68	2.36	20.37	2.28	0.34
Insurance	1,862.0	-1.97	1.04	2.86	-12.67	-9.40	0.97	9.07	3.40	0.77
Consumer Discretionary	2,406.9	0.63	-2.13	3.75	1.96	13.38				
Energy	1,523.5	0.61	3.14	9.92	14.99	28.12	1.22	9.97	4.82	0.31
Technology	1,164.0	0.00	0.63	3.23	8.11	11.89	1.36			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 jumped more than 1% on Wednesday after reports Israel is preparing a strike on Iranian nuclear facilities, raising fears that a conflict could upset supply availability in the key Middle East producing region. Brent futures for July rose 86 cents, or 1.32%, to \$66.24 a barrel.

Kuwait Market

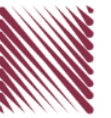
The market closed down by -0.11% at 8,043.1 value traded 83.0 million KD, Premier market value reached 59.8 million KD, closed down by -0.08% at 8,701.3.

KSA Market

The market closed up at 0.29% at 11,438.2.

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	0.943	-0.53	-1.46	-0.95	-5.52	10.51	1.85	14.57	3.53	8.24
KFH	0.739	0.00	-0.14	2.21	0.39	6.99	2.12	17.09	2.76	13.64
ZAIN	0.478	-1.04	-2.45	1.06	-0.42	1.92	1.62	9.14	7.32	2.07
BOUBYAN BANK	0.673	-0.44	-0.74	-0.88	3.01	25.96	2.85	32.58	1.42	2.97
AGILITY	0.253	-1.17	-3.80	-3.80	0.40	2.43	0.63	10.16	3.95	0.68
Saudi Arabia										
ARAMCO	26.20	-0.19	0.19	3.35	-2.06	-6.60	4.30	16.41	6.20	6,340.06
SABIC	59.10	-0.34	-1.99	-3.11	-7.22	-11.79	1.14	702.90	5.75	177.29
STC	43.35	0.46	0.23	-4.79	-0.07	13.30	2.37	19.14	4.38	216.74
AL-RAJHI BANK	97.40	0.41	-0.41	0.00	-4.51	2.96	2.91	19.35	2.78	389.58
NCB	35.95	1.13	1.27	0.70	0.28	7.63	1.10	10.04	5.29	215.69
Abu Dhabi										
ETISALAT.AD	17.22	0.00	-0.12	-1.03	1.89	5.51	2.94	10.87	4.82	149.75
FAB.AD	16.50	3.25	4.04	9.85	19.39	20.09	1.43	10.52	4.55	182.27
EMIRATES NBD	23.05	-1.50	1.99	12.17	14.11	7.46	1.15	6.63	4.34	145.59
DB ISLAMIC DB	7.99	-0.50	1.27	5.69	11.44	12.69	1.27	7.54	5.63	57.85
EMAR.DU	13.55	0.74	1.50	3.44	1.50	5.45	1.49	8.37	7.38	119.76
Qatar										
QNB	17.340	-0.06	0.81	3.83	7.70	0.29	1.41	10.19	4.04	160.19
INDUSTREIS QAT	12.540	1.54	3.21	-0.16	-2.72	-5.50	2.10	18.05	5.90	75.88
QA ISLAMIC BK	22.460	0.99	4.71	6.40	9.19	5.15	1.72	12.00	3.56	53.08
MASRAF AL RAYA	2.359	1.99	2.57	5.69	4.84	-4.22	0.89	15.00	4.24	21.94
MESAIEED PETRO	1.390	0.22	0.36	-1.42	-3.34	-7.02	1.08	24.56	4.10	17.47
Oman										
BANK MUSCAT	0.275	0.00	0.73	7.84	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.840	-0.12	1.82	2.69	-1.18	-10.64	0.98	7.87	6.55	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	0.00	1.36	2.76	-8.18	-5.39	0.68	7.15	6.41	0.21

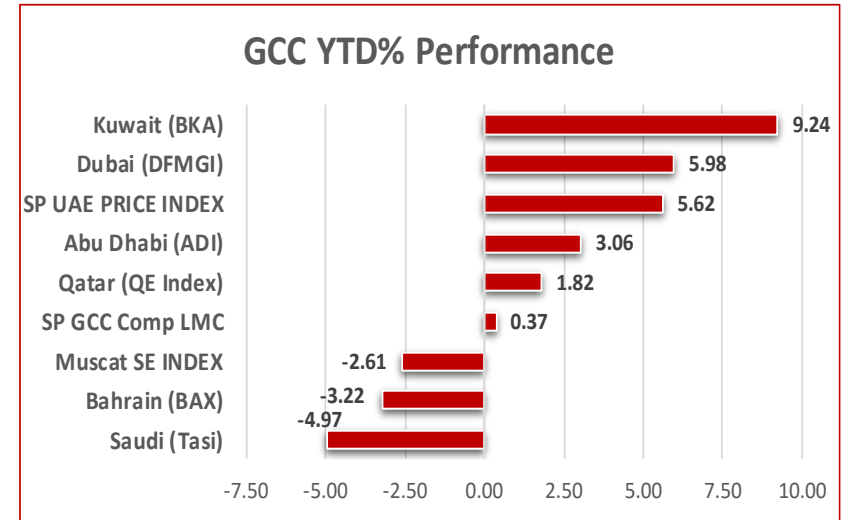
* GCC Markets performance at the latest close.

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 -0.11%, the lowest performing sector today is health care at -2.91%.

KSA

Aramco closed at -0.19%, Sabic closed at -0.34%. STC closed at 0.46% and Al-Rajhi closed at 0.41%.

UAE

ETISALAT.AD closed at flat level, FAB.AD closed at 3.25%.



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