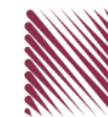


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 22nd May 2025



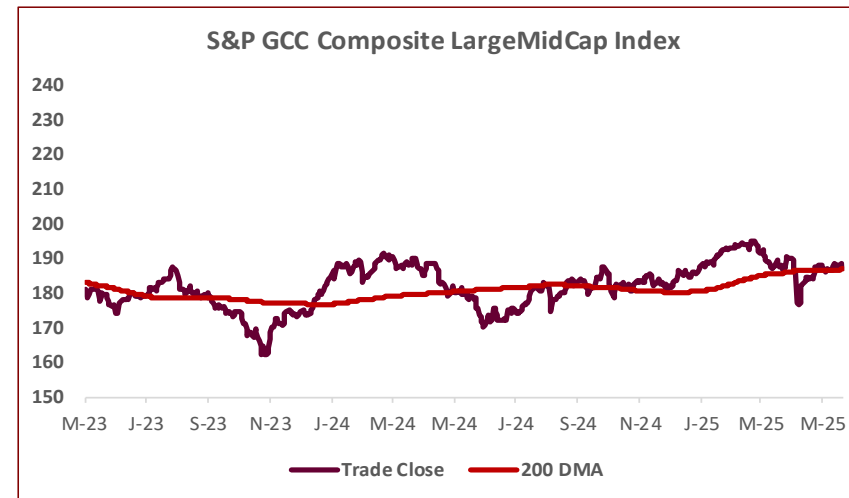


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,303.7	-1.18	-1.58	-3.15	-6.00	-6.09	2.05	15.46	3.79	9,548.66
Qatar (QE Index)	10,772.4	0.08	1.87	2.99	5.27	1.90	1.22	11.77	4.58	543.75
Dubai (DFMGI)	5,438.4	-0.53	-0.31	2.47	6.71	5.42	1.76	10.18	5.17	812.96
Abu Dhabi (ADI)	9,666.5	-0.42	0.13	1.39	3.18	2.63	2.04	14.77	3.00	2,707.96
Bahrain (BAX)	1,920.8	-0.06	0.00	0.45	-1.56	-3.28	0.84	8.43	5.24	7.45
Muscat SE INDEX	4,471.1	0.31	1.38	3.59	2.38	-2.30	0.80	9.29	6.34	7.29
SP GCC Comp LMC	188.6	0.00	0.09	0.22	-0.85	0.37	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.8	0.00	0.76	3.95	6.70	5.62				

Developed Markets										
MSCI World Index	3,829.8	-1.04	-0.87	4.77	5.54	3.29				
U.S. (S&P 500)	5,844.6	-1.61	-1.91	4.95	4.15	-0.63	4.53	26.03	1.57	52,939.78
U.K. (FTSE 100)	8,786.5	0.06	1.17	3.43	2.37	7.51	1.85	16.58	3.43	2,283.39
Japan (topix)	2,732.9	-0.22	-0.28	2.46	2.79	-1.87	1.40	14.04	2.47	950,553.45
Emerging Markets										
MSCI EM Index	1,174.6	0.61	0.19	5.55	6.64	9.21				
China (SSE Composite)	3,387.6	0.21	0.60	3.31	1.55	1.07	1.36	12.00		44,025.04
India (Sensex)	81,596.6	0.51	-0.89	1.69	5.40	4.42	4.42	23.17	1.15	159,224.45

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,070.0	0.33	-0.23	1.39	-0.05	9.61	1.65	15.03	3.49	48.85
Kuwait Premier Index	8,735.4	0.39	-0.24	2.13	0.70	11.44	1.82	16.42	3.32	40.59
Kuwait Main Index	7,001.3	0.05	-0.18	-2.15	-3.66	1.36	1.11	10.27	4.32	8.26
Kuwait Sector										
Banking	2,019.1	0.46	-0.15	0.72	-1.23	11.56	1.93	16.25	3.05	30.55
Telecom	1,045.2	0.51	-1.10	1.47	-0.45	2.70	1.56	10.07	7.29	3.18
Industrials	771.2	0.50	-0.12	2.49	3.52	6.58	1.19	14.77	4.93	2.60
Financial Services	1,516.9	-0.37	-0.32	2.54	0.56	0.42	1.18	13.05	3.29	5.08
Real Estate	1,654.4	0.52	0.71	3.99	9.05	22.27	1.15	17.24	1.79	3.50
Basic Materials	911.9	0.81	0.62	0.14	1.45	0.07	1.66	13.15	10.08	0.51
Health Care	551.8	5.50	-2.33	-4.95	-3.29	20.41	1.79	20.62	2.00	
Consumer Staples	1,086.0	-0.86	1.40	3.46	10.02	8.74	2.29	19.76	2.35	0.33
Insurance	1,825.6	-1.95	-0.93	0.85	-14.38	-11.17	0.95	9.48	3.47	0.75
Consumer Discretionary	2,398.9	-0.33	-2.45	3.40	1.62	13.01				
Energy	1,523.3	-0.01	3.13	9.90	14.97	28.10	1.23	10.06	4.79	0.31
Technology	1,120.4	-3.75	-3.14	-0.64	4.05	7.69	1.36			0.02
Utilities	384.2	0.69	0.69	-1.35	-5.19	-3.31				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Brent futures fell 47 cents, or 0.72%, to close at \$64.91 a barrel. U.S. West Texas Intermediate crude was down 46 cents, or 0.74%, to settle at \$61.57.

Kuwait Market

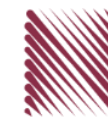
The market closed up by 0.33% at 8,070.0 value traded 82.0 million KD, Premier market value reached 52.2 million KD, closed up by 0.39% at 8,735.4.

KSA Market

The market closed down at -1.18% at 11,303.7.

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	0.950	0.74	-0.73	-0.21	-4.82	11.33	1.86	14.68	3.51	8.30
KFH	0.740	0.14	0.00	2.35	0.53	7.13	2.12	17.11	2.75	13.66
ZAIN	0.482	0.84	-1.63	1.90	0.42	2.77	1.63	9.22	7.26	2.08
BOUBYAN BANK	0.674	0.15	-0.59	-0.74	3.16	26.15	2.85	32.62	1.41	2.97
AGILITY	0.256	1.19	-2.66	-2.66	1.59	3.64	0.66	11.52	3.91	0.68
Saudi Arabia										
ARAMCO	26.10	-0.38	-0.19	2.96	-2.43	-6.95	4.28	16.35	6.23	6,316.37
SABIC	58.50	-1.02	-2.99	-4.10	-8.16	-12.69	1.12	695.77	5.81	175.50
STC	42.95	-0.92	-0.69	-5.67	-0.99	12.26	2.35	18.96	4.42	214.76
AL-RAJHI BANK	96.00	-1.44	-1.84	-1.44	-5.88	1.48	2.87	19.07	2.82	384.01
NCB	35.10	-2.36	-1.13	-1.68	-2.09	5.09	1.08	9.81	5.41	210.61
Abu Dhabi										
ETISALAT.AD	17.16	-0.35	-0.46	-1.38	1.54	5.15	2.93	10.83	4.84	149.25
FAB.AD	16.16	-2.06	1.89	7.59	16.93	17.61	1.40	10.30	4.64	178.54
EMIRATES NBD	22.45	-2.60	-0.66	9.25	11.14	4.66	1.12	6.46	4.45	141.82
DB ISLAMIC DB	7.99	0.00	1.27	5.69	11.44	12.69	1.27	7.54	5.63	57.86
EMAR.DU	13.65	0.74	2.25	4.20	2.25	6.23	1.50	8.44	7.33	120.66
Qatar										
QNB	17.380	0.23	1.05	4.07	7.95	0.52	1.41	10.21	4.03	160.49
INDUSTREIS QAT	12.420	-0.96	2.22	-1.11	-3.65	-6.41	2.08	17.88	5.96	75.12
QA ISLAMIC BK	22.420	-0.18	4.52	6.21	8.99	4.96	1.72	11.97	3.57	52.96
MASRAF AL RAYA	2.350	-0.38	2.17	5.29	4.44	-4.59	0.89	14.94	4.26	21.85
MESAIEED PETRO	1.405	1.08	1.44	-0.35	-2.29	-6.02	1.09	24.83	4.06	17.65
Oman										
BANK MUSCAT	0.276	0.36	1.10	8.24	9.09	9.52	0.87	10.04	5.98	2.07
OMANTEL	0.837	-0.36	1.45	2.32	-1.53	-10.96	0.98	7.84	6.57	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	0.290	-1.69	-1.69	-1.69	0.00	-2.03	0.61	9.07	3.24	0.47
OMINVEST	0.223	0.00	1.36	2.76	-8.18	-5.39	0.68	7.15	6.41	0.21

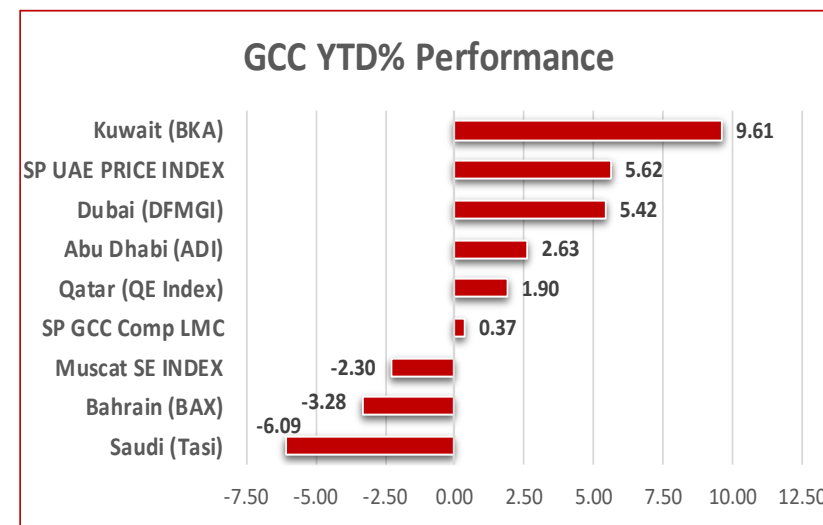
* GCC Markets performance at the latest close.

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 up today by 0.33%, the best performing sector today is health care at 5.50%.

KSA

Aramco closed at -0.38%, Sabic closed at -1.02%. STC closed at -0.92% and Al-Rajhi closed at -1.44%.

UAE

ETISALAT.AD closed at -0.35%, FAB.AD closed at -2.06%.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw