

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 23rd March 2025



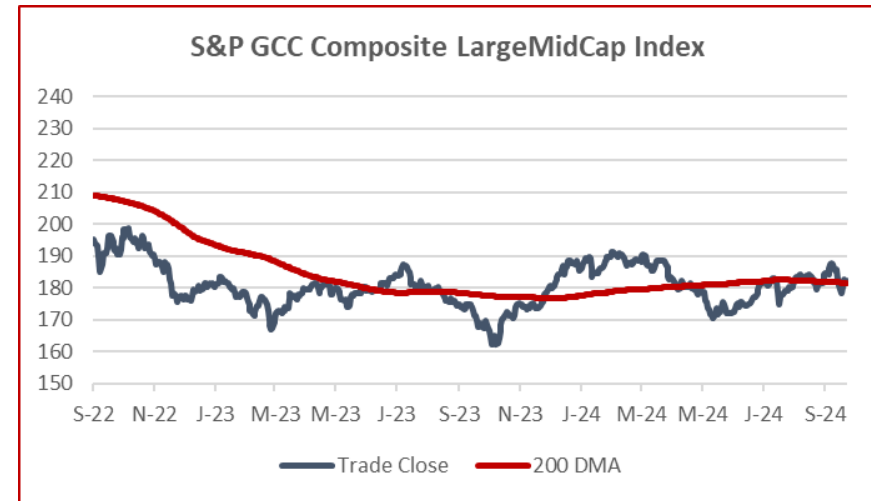


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,760.3	0.43	0.29	-2.90	-2.29	-2.29	2.14	16.47	3.56	9,565.56
Qatar (QE Index)	10,343.7	-0.40	-0.76	-0.98	-2.15	-2.15	1.17	11.25	4.79	520.28
Dubai (DFMGI)	5,099.8	-0.62	-0.79	-4.10	-1.14	-1.14	1.64	9.78	5.47	757.33
Abu Dhabi (ADI)	9,368.4	0.00	-0.53	-2.05	-0.54	-0.54	2.37	18.10	2.34	2,646.63
Bahrain (BAX)	1,962.1	-0.15	-0.52	0.10	-1.20	-1.20	0.87	8.83	5.03	7.46
Muscat SE INDEX	4,410.7	0.56	0.53	-0.57	-3.62	-3.62	0.78	9.14	6.47	7.13
SP GCC Comp LMC	188.0	0.05	0.22	-2.02	0.04	0.04	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	150.5	0.06	-0.53	-3.75	-1.12	-1.12				

Developed Markets										
MSCI World Index	3,689.9	-0.10	0.66	-3.03	-0.49	-0.49				
U.S. (S&P 500)	5,667.6	0.08	0.51	-4.82	-3.64	-3.64	4.41	25.36	1.62	50,445.59
U.K. (FTSE 100)	8,646.8	-0.63	0.17	-1.85	5.80	5.80	1.78	16.37	3.56	2,228.51
Japan (topix)	2,804.2	0.29	3.25	4.55	0.69	0.69	1.46	14.20	2.24	972,884.89
Emerging Markets										
MSCI EM Index	1,131.4	-0.82	1.05	3.11	5.20	5.20				
China (SSE Composite)	3,364.8	-1.29	-1.60	1.32	0.39	0.39	1.36	12.00		44,025.04
India (Sensex)	76,905.5	0.73	4.17	5.06	-1.58	-1.58	4.17	21.68	1.17	150,520.62

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,988.4	0.66	1.02	-1.39	8.50	8.50	1.63	14.97	3.56	48.12
Kuwait Premier Index	8,547.1	0.60	0.84	-1.68	9.04	9.04	1.76	16.26	3.36	39.41
Kuwait Main Index	7,331.8	0.93	1.84	-0.04	6.15	6.15	1.21	10.66	4.54	8.72
Kuwait Sector										
Banking	2,024.6	0.91	1.32	-0.22	11.87	11.87	1.98	16.29	3.02	30.33
Telecom	1,033.5	0.43	0.16	-3.31	1.55	1.55	1.55	10.92	8.13	3.16
Industrials	740.8	-0.09	1.25	-2.89	2.37	2.37	0.84	13.11	5.75	2.51
Financial Services	1,489.6	-0.16	-1.24	-5.05	-1.39	-1.39	1.19	12.08	3.02	4.98
Real Estate	1,496.2	0.04	0.05	-4.25	10.57	10.57	1.12	17.21	2.02	3.19
Basic Materials	885.2	-0.99	2.19	-5.01	-2.86	-2.86	1.58	11.01	9.90	0.50
Health Care	568.8	0.00	5.59	9.53	24.11	24.11	1.90	19.22	1.84	
Consumer Staples	943.9	-1.57	-5.68	-8.93	-5.49	-5.49	1.91	19.17	2.18	0.29
Insurance	2,105.5	1.48	1.14	1.97	2.45	2.45	1.10	10.63	3.89	0.85
Consumer Discretionary	2,336.2	2.21	6.58	0.54	10.05	10.05				
Energy	1,323.4	0.12	0.39	-3.02	11.29	11.29	1.10	10.08	5.51	0.27
Technology	1,091.3	-1.32	-6.83	-32.43	4.90	4.90	1.27			0.02
Utilities	400.0	0.00	-0.65	-1.93	0.66	0.66				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose on Friday, posting their second consecutive weekly gains, after fresh U.S. sanctions on Iran and a new OPEC+ plan for seven members to cut output raised bets on tightening supply. Brent crude futures climbed 16 cents, or 0.22%, to close at \$72.16 per barrel. U.S. West Texas Intermediate crude futures gained 21 cents, or 0.31%, to settle at \$68.28 a barrel. On a weekly basis, Brent gained 2.24% and WTI rose 1.64%.

Kuwait Market

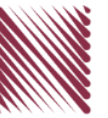
The market closed up by 0.66% at 7,988.4 value traded 108.5 million KD, Premier market value reached 77.3 million KD, closed up by 0.60% at 8,547.1

KSA Market

The market closed up by 0.43% at 11,760.3

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	1.041	0.77	1.66	1.07	16.18	16.18	1.90	14.99	3.36	8.67
KFH	0.789	1.15	0.64	-1.50	5.76	5.76	2.21	17.01	2.79	13.50
ZAIN	0.467	0.00	-0.21	-4.89	-0.43	-0.43	1.65	9.76	7.49	2.02
BOUBYAN BANK	0.679	0.74	4.14	1.34	21.03	21.03	2.68	31.42	1.47	2.85
AGILITY	0.256	0.39	0.79	-6.23	3.64	3.64	0.67	10.68	7.81	0.69
Saudi Arabia										
ARAMCO	25.70	2.59	-0.96	-5.17	-8.38	-8.38	4.26	15.78	6.91	6,219.40
SABIC	63.00	0.80	-0.47	1.61	-5.97	-5.97	1.21	90.18	5.40	189.00
STC	44.70	0.45	2.29	-1.22	11.75	11.75	2.49	20.81	3.91	223.50
AL-RAJHI BANK	100.80	-0.59	-0.40	1.00	6.55	6.55	3.28	21.58	2.38	403.20
NCB	35.50	-0.14	2.90	1.43	6.29	6.29	1.10	10.33	5.35	213.00
Abu Dhabi										
ETISALAT.AD	17.30	1.04	0.23	4.80	7.11	7.11	3.34	14.14	4.66	152.02
FAB.AD	13.26	1.66	-4.40	-5.34	-1.89	-1.89	1.14	9.12	5.56	148.83
EMIRATES NBD	19.95	2.05	-1.24	-9.73	-6.99	-6.99	1.00	5.61	5.01	126.02
DB ISLAMIC DB	7.24	-3.98	-4.11	-6.34	2.12	2.12	1.05	6.97	6.22	52.42
EMAR.DU	13.40	0.75	2.29	-1.11	4.28	4.28	1.39	8.76	7.46	118.44
Qatar										
QNB	16.110	0.06	-1.77	-2.95	-6.82	-6.82	1.32	9.55	4.35	148.80
INDUSTREIS QAT	13.160	-0.68	-0.23	-0.53	-0.83	-0.83	2.11	17.73	5.62	79.32
QA ISLAMIC BK	20.600	0.00	-2.23	-1.10	-3.56	-3.56	1.56	11.10	3.88	48.68
MASRAF AL RAYA	2.291	-1.25	-0.22	-1.25	-6.98	-6.98	0.85	14.58	4.36	21.36
MESAIEED PETRO	1.410	-1.05	1.44	-1.33	-5.69	-5.69	1.08	24.65	4.04	17.71
Oman										
BANK MUSCAT	0.261	1.16	2.35	2.76	3.57	3.57	0.80	9.70	6.32	1.96
OMANTEL	0.826	0.12	2.74	0.49	-12.13	-12.13	0.93	8.03	6.66	0.62
BANK DHOFAR	0.151	0.00	0.00	0.00	-3.21	-3.21	0.61	13.71	4.34	0.45
NAT BANK OF OMAN	0.290	0.00	-3.33	3.57	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.331	0.91	0.30	-0.90	0.30	0.30	0.69	8.14	6.04	0.22

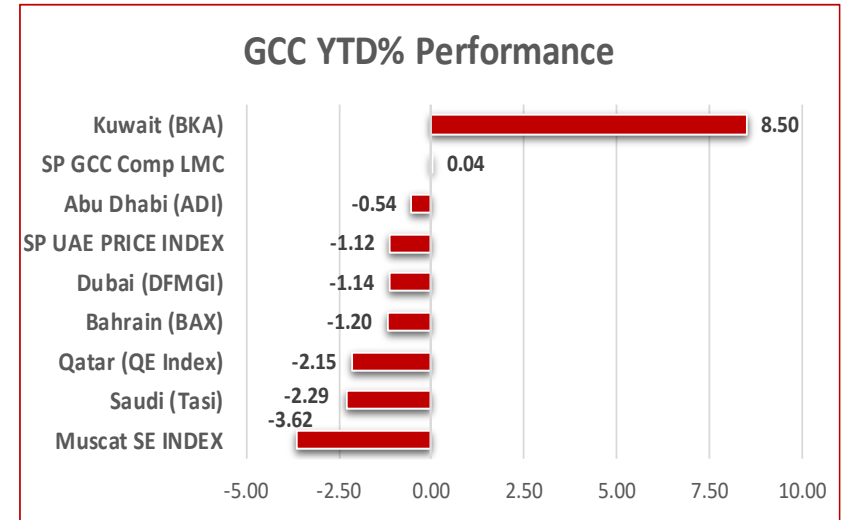
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
12-Mar. 25	25.52%	15.37%	0.06%	4.53%	9.16%	18.11%	13.54%	6.70%	7.20%
19-Mar. 25	25.63%	15.37%	0.06%	4.72%	9.36%	18.16%	13.59%	6.72%	7.23%

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 0.66%, the best performing sector today is consumer Discretionary at 2.21%.

KSA

Aramco closed today at 2.59%, Sabic closed at 0.80%, STC closed at 0.45%, and Al Rajhi closed at -0.59%.

UAE

ETISALAT.AD had closed today at 1.04%, FAB.AD closed with a with a positive performance at 1.66%.



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