

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

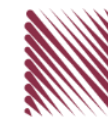
GCC DAILY MORNING BRIEF

Monday, 26th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

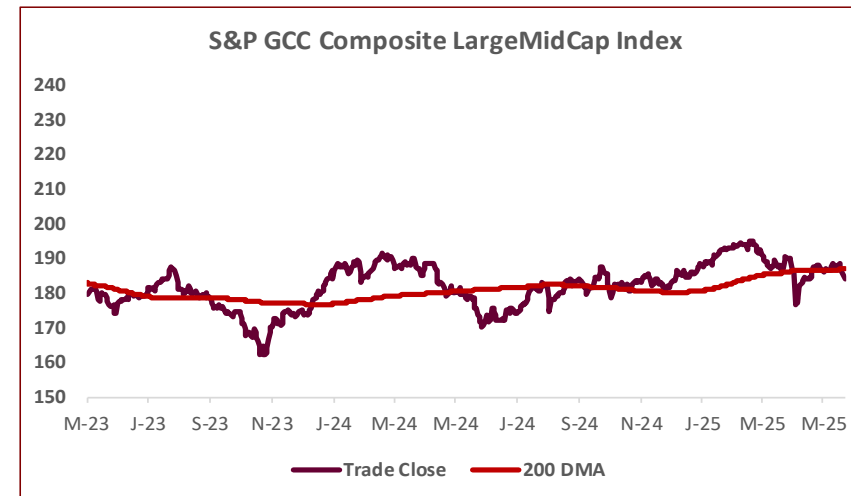


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,999.8	-1.69	-1.69	-5.76	-8.53	-8.61	2.00	15.52	3.89	9,205.85
Qatar (QE Index)	10,736.4	-0.35	-0.35	2.64	4.92	1.56	1.22	11.73	4.59	541.52
Dubai (DFMGI)	5,464.2	0.21	0.16	2.96	7.22	5.92	1.77	10.23	5.14	818.01
Abu Dhabi (ADI)	9,665.3	-0.02	0.12	1.37	3.17	2.62	2.04	14.75	3.00	2,709.80
Bahrain (BAX)	1,921.5	-0.04	-0.04	0.49	-1.53	-3.24	0.84	8.48	5.24	7.46
Muscat SE INDEX	4,514.6	0.38	0.38	4.60	3.38	-1.35	0.80	9.37	6.29	7.34
SP GCC Comp LMC	184.0	-1.16	-1.16	-2.23	-3.27	-2.08	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.2	0.00	0.00	3.55	6.29	5.21				

Developed Markets										
MSCI World Index	3,802.8	-0.42	-1.57	4.03	4.80	2.56				
U.S. (S&P 500)	5,802.8	-0.67	-2.61	4.20	3.40	-1.34	4.44	25.41	1.61	51,773.69
U.K. (FTSE 100)	8,718.0	-0.24	0.38	2.63	1.57	6.67	1.84	16.50	3.46	2,265.63
Japan (topix)	2,735.5	0.68	-0.18	2.56	2.89	-1.77	1.40	14.06	2.47	950,498.26
Emerging Markets										
MSCI EM Index	1,171.0	0.48	-0.12	5.22	6.32	8.88				
China (SSE Composite)	3,348.4	-0.94	-0.57	2.11	0.38	-0.10	1.36	12.00		44,025.04
India (Sensex)	81,721.1	0.95	-0.74	1.84	5.56	4.58	4.43	23.43	1.19	159,333.81

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,039.4	-0.17	-0.17	1.00	-0.43	9.19	1.65	15.10	3.46	48.91
Kuwait Premier Index	8,697.6	-0.24	-0.24	1.68	0.26	10.96	1.83	16.50	3.31	40.67
Kuwait Main Index	6,993.4	0.20	0.20	-2.26	-3.77	1.25	1.11	10.30	4.20	8.24
Kuwait Sector										
Banking	2,010.6	-0.30	-0.30	0.30	-1.64	11.09	1.94	16.31	3.05	30.65
Telecom	1,040.9	-0.25	-0.25	1.05	-0.86	2.28	1.57	10.10	7.27	3.19
Industrials	766.0	-0.54	-0.54	1.79	2.81	5.85	1.19	15.54	4.92	2.61
Financial Services	1,504.3	0.12	0.12	1.70	-0.27	-0.41	1.17	12.90	3.34	5.01
Real Estate	1,659.6	0.81	0.81	4.31	9.39	22.65	1.15	17.34	1.78	3.50
Basic Materials	912.3	0.19	0.19	0.19	1.49	0.12	1.67	13.23	8.12	0.51
Health Care	573.4	0.00	0.00	-1.24	0.50	25.12	1.94	22.60	1.83	
Consumer Staples	1,119.2	1.05	1.05	6.62	13.39	12.07	2.31	20.02	2.32	0.34
Insurance	1,829.9	0.25	0.25	1.09	-14.18	-10.97	0.93	9.29	3.54	0.74
Consumer Discretionary	2,374.5	-0.53	-0.53	2.35	0.59	11.86				
Energy	1,525.8	0.20	0.20	10.08	15.16	28.31	1.23	10.07	4.79	0.31
Technology	1,127.6	1.97	1.97	0.00	4.73	8.39	1.29			0.02
Utilities	379.0	-0.69	-0.69	-2.70	-6.49	-4.64				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

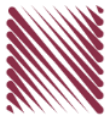
Oil prices gained in early Asian trade on Monday after U.S. President Donald Trump extended a deadline for trade talks with the European Union, easing concerns about U.S. tariffs on the bloc that could hurt the global economy and fuel demand. Brent crude futures rose 37 cents, or 0.6%, to \$65.15 a barrel by 0001 GMT while U.S. West Texas Intermediate crude was up 34 cents, or 0.6%, at \$61.87 a barrel.

Kuwait Market

The market closed down by -0.17% at 8,039.4 value traded 62.8 million KD, Premier market value reached 38.1 million KD, closed down by -0.24% at 8,697.6.

KSA Market

The market closed down at -1.69% at 10,999.8



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.946	-0.11	-0.11	-0.63	-5.22	10.86	1.85	14.62	3.52	8.27
KFH	0.739	-0.40	-0.40	2.21	0.39	6.99	2.12	17.09	2.76	13.66
ZAIN	0.479	-0.42	-0.42	1.27	-0.21	2.13	1.62	9.16	7.31	2.07
BOUBYAN BANK	0.674	0.30	0.30	-0.74	3.16	26.15	2.85	32.62	1.41	2.97
AGILITY	0.248	-2.36	-2.36	-5.70	-1.59	0.40	0.64	11.16	4.03	0.66
Saudi Arabia										
ARAMCO	25.00	-0.60	-0.60	-1.38	-6.54	-10.87	4.10	15.66	6.50	6,051.13
SABIC	57.50	-2.21	-2.21	-5.74	-9.73	-14.18	1.10	683.87	5.91	172.53
STC	42.10	-1.17	-1.17	-7.53	-2.95	10.03	2.31	18.59	4.51	210.54
AL-RAJHI BANK	92.10	-2.02	-2.02	-5.44	-9.71	-2.64	2.75	18.29	2.94	368.47
NCB	34.50	-2.82	-2.82	-3.36	-3.77	3.29	1.06	9.64	5.51	207.04
Abu Dhabi										
ETISALAT.AD	17.28	0.58	0.23	-0.69	2.25	5.88	2.95	10.91	4.80	150.28
FAB.AD	16.02	-0.12	1.01	6.66	15.92	16.59	1.39	10.21	4.68	176.98
EMIRATES NBD	23.00	1.32	1.77	11.92	13.86	7.23	1.15	6.61	4.35	145.28
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	-0.37	1.50	3.44	1.50	5.45	1.49	8.37	7.38	119.77
Qatar										
QNB	17.310	-0.80	-0.80	3.65	7.52	0.12	1.40	10.17	4.04	160.26
INDUSTREIS QAT	12.340	-0.48	-0.48	-1.75	-4.27	-7.01	2.07	17.76	6.00	74.83
QA ISLAMIC BK	22.450	-0.18	-0.18	6.35	9.14	5.10	1.72	11.99	3.56	53.17
MASRAF AL RAYA	2.327	-0.77	-0.77	4.26	3.42	-5.52	0.88	14.80	4.30	21.69
MESAIEED PETRO	1.390	-0.43	-0.43	-1.42	-3.34	-7.02	1.08	24.56	4.10	17.50
Oman										
BANK MUSCAT	0.275	0.00	0.00	7.84	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.839	0.00	0.00	2.57	-1.29	-10.74	0.98	7.86	6.56	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	-0.45	2.76	-8.18	-5.39	0.68	7.15	6.41	0.21

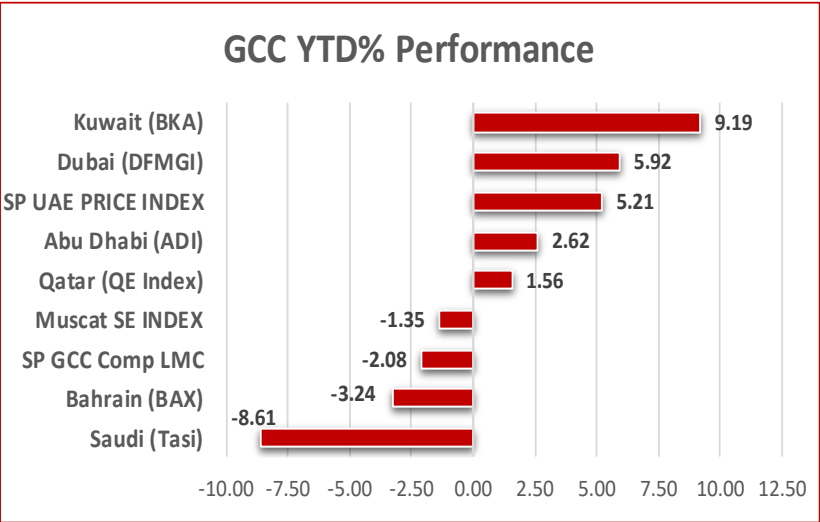
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
14-May. 25	26.66%	14.35%	0.07%	5.94%	9.17%	18.07%	13.79%	6.93%	7.43%
21-May. 25	26.74%	14.34%	0.07%	6.22%	9.09%	18.06%	13.84%	6.94%	7.44%

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 by -0.17%, the lowest performing sector today is utilities at -0.69%.

KSA

Aramco closed at -0.60%, Sabic closed at -2.21%. STC closed at -1.17% and Al-Rajhi closed at -2.02%.

UAE

ETISALAT.AD closed at 0.58%, FAB.AD closed at -0.12%.



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