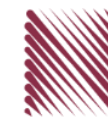


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 27th March 2025



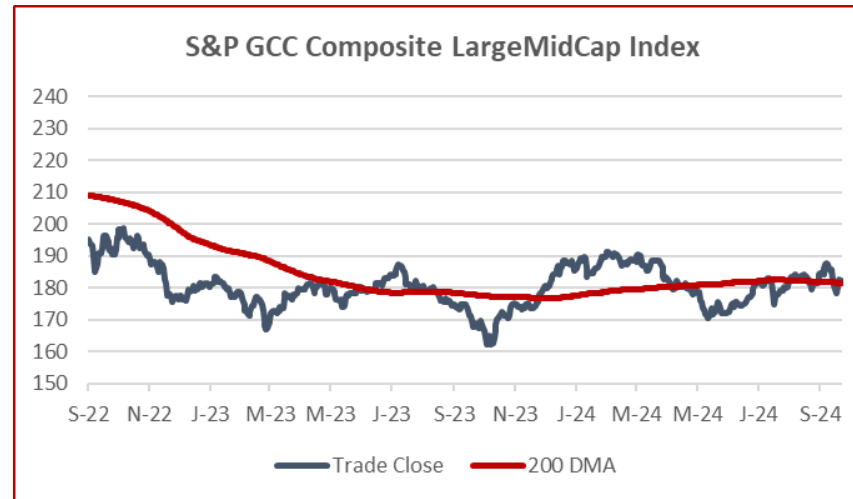


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,970.2	2.26	1.78	-1.17	-0.55	-0.55	2.17	16.72	3.57	9,876.35
Qatar (QE Index)	10,185.8	0.28	-1.53	-2.49	-3.64	-3.64	1.15	11.08	4.86	512.54
Dubai (DFMGI)	5,116.6	-0.01	0.33	-3.78	-0.82	-0.82	1.66	9.84	5.48	762.61
Abu Dhabi (ADI)	9,373.7	0.34	0.06	-2.00	-0.48	-0.48	1.98	14.82	3.13	2,651.01
Bahrain (BAX)	1,950.6	-0.35	-0.58	-0.49	-1.78	-1.78	0.87	8.83	5.07	7.40
Muscat SE INDEX	4,400.7	-0.17	-0.23	-0.79	-3.84	-3.84	0.78	9.17	6.46	7.15
SP GCC Comp LMC	189.9	1.50	1.04	-1.00	1.08	1.08	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.0	0.54	0.29	-3.47	-0.83	-0.83				

Developed Markets										
MSCI World Index	3,709.2	-1.01	0.52	-2.53	0.04	0.04				
U.S. (S&P 500)	5,712.2	-1.12	0.79	-4.07	-2.88	-2.88	4.45	25.59	1.61	50,977.34
U.K. (FTSE 100)	8,689.6	0.30	0.49	-1.36	6.32	6.32	1.80	16.52	3.52	2,264.20
Japan (topix)	2,815.5	0.09	0.40	4.97	1.10	1.10	1.46	14.23	2.23	975,906.94
Emerging Markets										
MSCI EM Index	1,131.5	0.19	0.01	3.12	5.21	5.21				
China (SSE Composite)	3,373.7	0.15	0.27	1.59	0.66	0.66	1.36	12.00		44,025.04
India (Sensex)	77,288.5	-0.93	0.50	5.59	-1.09	-1.09	4.19	21.78	1.16	151,447.96

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,062.7	-0.26	0.93	-0.47	9.51	9.51	1.64	15.18	3.52	48.55
Kuwait Premier Index	8,665.5	-0.29	1.39	-0.32	10.55	10.55	1.78	16.51	3.32	39.95
Kuwait Main Index	7,245.7	-0.12	-1.17	-1.22	4.90	4.90	1.18	10.67	4.51	8.60
Kuwait Sector										
Banking	2,047.3	-0.55	1.12	0.90	13.12	13.12	2.00	16.47	2.99	30.67
Telecom	1,036.4	0.11	0.28	-3.04	1.84	1.84	1.55	10.94	8.11	3.17
Industrials	740.5	-0.79	-0.05	-2.93	2.33	2.33	0.83	13.07	5.79	2.51
Financial Services	1,509.2	0.63	1.31	-3.80	-0.09	-0.09	1.20	12.67	2.96	5.04
Real Estate	1,509.6	0.60	0.90	-3.39	11.56	11.56	1.09	17.76	1.92	3.20
Basic Materials	887.7	0.20	0.28	-4.74	-2.58	-2.58	1.58	10.87	9.87	0.50
Health Care	570.9	0.00	0.37	9.94	24.57	24.57	1.91	19.30	1.84	
Consumer Staples	987.4	1.05	4.61	-4.73	-1.13	-1.13	2.00	20.05	2.60	0.30
Insurance	2,112.9	0.14	0.35	2.33	2.80	2.80	1.10	10.41	3.46	0.85
Consumer Discretionary	2,301.4	0.32	-1.49	-0.96	8.42	8.42				
Energy	1,376.6	-0.58	4.02	0.88	15.76	15.76	1.14	11.01	5.30	0.28
Technology	1,091.3	0.00	0.00	-32.43	4.90	4.90	1.27			0.02
Utilities	405.3	0.00	1.32	-0.64	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices nudged higher on Thursday on concerns about tighter global supply after the U.S. tariff threat on Venezuelan oil buyers, while market players also grappled with the impact of Donald Trump's latest announcement on auto-sector tariffs. Brent crude futures were up 14 cents, or 0.2%, at \$73.93 a barrel. U.S.

Kuwait Market

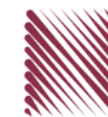
The market closed down by -0.26% at 8,062.7 value traded 98.4 million KD, Premier market value reached 82.2 million KD, closed down by -0.29% at 8,665.5.

KSA Market

The market closed up by 2.26% at 11,970.2

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	1.051	-1.31	0.96	2.04	17.30	17.30	1.92	15.14	3.33	8.81
KFH	0.798	-0.13	1.14	-0.37	6.97	6.97	2.24	17.20	2.76	13.64
ZAIN	0.470	-0.21	0.64	-4.28	0.21	0.21	1.66	9.82	7.45	2.03
BOUBYAN BANK	0.683	-0.58	0.59	1.94	21.75	21.75	2.70	31.61	1.46	2.88
AGILITY	0.252	-2.33	-1.56	-7.69	2.02	2.02	0.66	10.52	7.94	0.68
Saudi Arabia										
ARAMCO	26.65	2.11	3.70	-1.66	-4.99	-4.99	4.42	16.37	6.66	6,448.61
SABIC	64.00	1.43	1.59	3.23	-4.48	-4.48	1.22	91.61	5.31	191.98
STC	45.10	1.46	0.89	-0.33	12.75	12.75	2.52	21.00	3.88	225.48
AL-RAJHI BANK	102.00	3.03	1.19	2.20	7.82	7.82	3.32	21.83	2.66	407.96
NCB	35.95	2.42	1.27	2.71	7.63	7.63	1.11	10.46	5.29	215.68
Abu Dhabi										
ETISALAT.AD	17.10	-0.47	-2.17	2.52	4.78	4.78	3.26	13.83	4.85	148.71
FAB.AD	13.64	0.29	1.19	-4.21	-0.73	-0.73	1.15	9.23	5.50	150.60
EMIRATES NBD	20.30	2.53	1.75	-8.14	-5.36	-5.36	1.02	5.70	4.93	128.23
DB ISLAMIC DB	7.21	0.28	-0.41	-6.73	1.69	1.69	1.05	6.94	6.24	52.13
EMAR.DU	13.50	0.75	0.75	-0.37	5.06	5.06	1.40	8.83	7.41	119.32
Qatar										
QNB	15.950	0.31	-0.99	-3.92	-7.75	-7.75	1.30	9.46	4.39	148.06
INDUSTREIS QAT	12.670	-0.63	-3.72	-4.23	-4.52	-4.52	2.03	17.07	5.84	76.53
QA ISLAMIC BK	20.370	0.20	-1.12	-2.21	-4.63	-4.63	1.54	10.97	3.93	48.13
MASRAF AL RAYA	2.330	1.08	1.70	0.43	-5.40	-5.40	0.86	14.83	4.29	20.93
MESAIEED PETRO	1.438	1.63	1.99	0.63	-3.81	-3.81	1.10	25.14	3.96	18.05
Oman										
BANK MUSCAT	0.266	0.76	1.92	4.72	5.56	5.56	0.82	9.88	6.20	1.88
OMANTEL	0.850	-0.12	2.91	3.41	-9.57	-9.57	0.96	8.26	6.47	0.64
BANK DHOFAR	0.143	0.00	-3.97	-3.97	-7.05	-7.05	0.58	13.05	4.52	0.43
NAT BANK OF OMAN	0.290	0.00	0.00	3.57	-2.03	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.337	-0.59	1.81	0.90	2.12	2.12	0.70	8.29	5.93	0.23

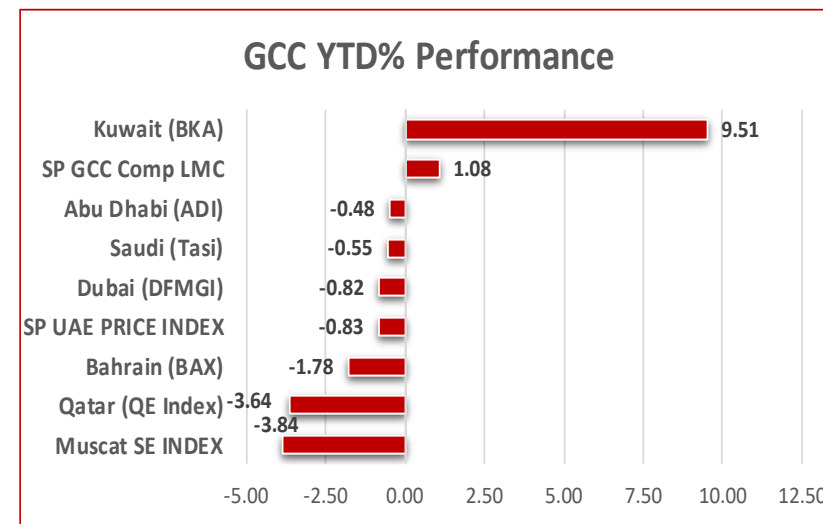
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
19-Mar. 25	25.63%	15.37%	0.06%	4.72%	9.36%	18.16%	13.59%	6.72%	7.23%
26-Mar. 25	25.80%	15.52%	0.06%	4.96%	9.47%	18.12%	13.62%	6.82%	7.21%

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 -0.26%, the worst performing sector today is industrials at -0.79%.

KSA

Aramco closed today at 2.11%, Sabic closed at 1.43%, STC closed at 1.46%, and Al Rajhi closed at 3.03%.

UAE

ETISALAT.AD had closed today at -0.47%, FAB.AD closed with a with a positive performance at 0.29%.



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