



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 27th May 2025



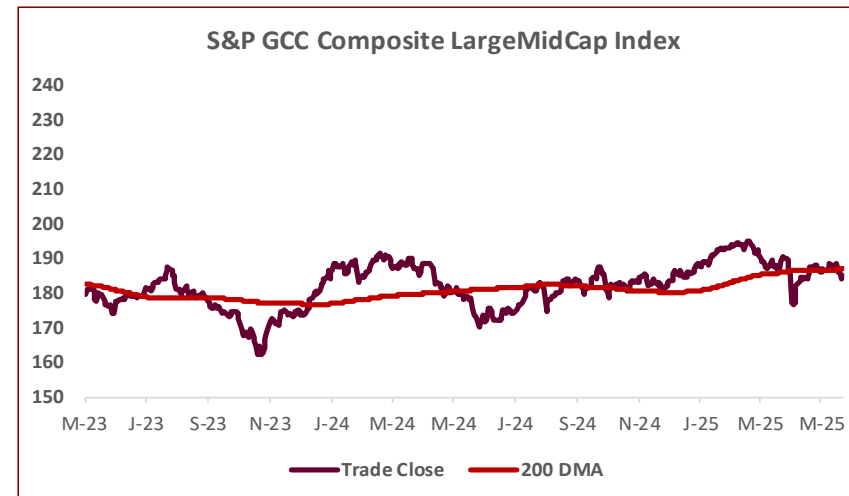


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,076.0	0.69	-1.01	-5.10	-7.89	-7.98	2.01	15.61	3.86	9,280.02
Qatar (QE Index)	10,731.9	-0.04	-0.39	2.60	4.88	1.52	1.22	11.73	4.60	541.19
Dubai (DFMGI)	5,484.5	0.37	0.37	3.34	7.62	6.32	1.77	10.26	5.13	821.28
Abu Dhabi (ADI)	9,658.8	-0.07	-0.07	1.31	3.10	2.55	2.04	14.73	3.01	2,712.36
Bahrain (BAX)	1,921.0	-0.03	-0.07	0.46	-1.56	-3.27	0.84	8.47	5.25	7.45
Muscat SE INDEX	4,510.6	-0.09	0.29	4.50	3.29	-1.44	0.80	9.36	6.29	7.34
SP GCC Comp LMC	185.0	0.55	-0.62	-1.69	-2.74	-1.55	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.2	0.04	0.04	3.59	6.33	5.25				

Developed Markets										
MSCI World Index	3,813.9	0.29	0.29	4.33	5.11	2.86				
U.S. (S&P 500)	5,802.8	0.00	0.00	4.20	3.40	-1.34	4.44	25.41	1.61	51,773.43
U.K. (FTSE 100)	8,718.0	0.00	0.00	2.63	1.57	6.67	1.84	16.50	3.46	2,265.74
Japan (topix)	2,751.9	0.60	0.60	3.17	3.50	-1.19	1.41	14.14	2.45	955,243.19
Emerging Markets										
MSCI EM Index	1,170.1	-0.07	-0.07	5.15	6.24	8.80				
China (SSE Composite)	3,346.8	-0.05	-0.05	2.07	0.33	-0.15	1.36	12.00		44,025.04
India (Sensex)	82,176.5	0.56	0.56	2.41	6.15	5.17	4.45	23.52	1.18	160,232.14

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,040.4	0.01	-0.15	1.02	-0.42	9.21	1.65	15.04	3.47	48.82
Kuwait Premier Index	8,702.5	0.06	-0.19	1.74	0.32	11.02	1.82	16.47	3.32	40.57
Kuwait Main Index	6,979.3	-0.20	0.00	-2.46	-3.97	1.04	1.11	10.16	4.19	8.25
Kuwait Sector										
Banking	2,016.9	0.31	0.01	0.61	-1.33	11.44	1.93	16.26	3.06	30.55
Telecom	1,037.6	-0.32	-0.57	0.73	-1.17	1.95	1.56	10.08	7.29	3.18
Industrials	767.4	0.19	-0.35	1.98	3.00	6.05	1.19	15.41	4.95	2.59
Financial Services	1,495.8	-0.57	-0.45	1.12	-0.83	-0.98	1.17	12.93	3.34	5.02
Real Estate	1,658.7	-0.06	0.75	4.25	9.33	22.58	1.16	17.62	1.77	3.53
Basic Materials	911.0	-0.15	0.05	0.05	1.35	-0.03	1.67	13.26	8.11	0.51
Health Care	526.6	-8.17	-8.17	-9.31	-7.72	14.89	1.94		1.83	
Consumer Staples	1,105.9	-1.19	-0.15	5.36	12.04	10.74	2.34	20.21	2.30	0.34
Insurance	1,833.2	0.18	0.43	1.27	-14.02	-10.80	0.93	9.30	3.53	0.74
Consumer Discretionary	2,336.3	-1.61	-2.12	0.71	-1.03	10.06				
Energy	1,526.1	0.02	0.21	10.10	15.18	28.33	1.23	10.03	4.78	0.31
Technology	1,134.9	0.65	2.63	0.65	5.41	9.09	1.31			0.02
Utilities	376.3	-0.69	-1.38	-3.38	-7.14	-5.30				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices eased on Tuesday as market participants weighed the possibility of an OPEC+ decision to further increase its crude oil output at a meeting later this week. Brent crude futures shed 12 cents, or 0.19%, to \$64.62 a barrel by 0022 GMT, while U.S. West Texas Intermediate crude was down 15 cents, or 0.24%, at \$61.38 a barrel.

Kuwait Market

The market closed up by 0.01% at 8,040.4 value traded 84.2 million KD, Premier market value reached 57.5 million KD, closed up by 0.06% at 8,702.5.

KSA Market

The market closed up at 0.69% at 11,076.0



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.942	-0.42	-0.53	-1.05	-5.62	10.39	1.84	14.56	3.54	8.24
KFH	0.743	0.54	0.13	2.77	0.94	7.57	2.13	17.18	2.74	13.73
ZAIN	0.478	-0.21	-0.62	1.06	-0.42	1.92	1.62	9.14	7.32	2.07
BOUBYAN BANK	0.672	-0.30	0.00	-1.03	2.86	25.78	2.84	32.53	1.42	2.96
AGILITY	0.247	-0.40	-2.76	-6.08	-1.98	0.00	0.64	11.12	4.05	0.66
Saudi Arabia										
ARAMCO	25.20	0.80	0.20	-0.59	-5.79	-10.16	4.14	15.78	6.45	6,098.56
SABIC	57.50	0.00	-2.21	-5.74	-9.73	-14.18	1.10	683.87	5.91	172.50
STC	42.20	0.24	-0.94	-7.31	-2.72	10.30	2.31	18.63	4.50	211.01
AL-RAJHI BANK	92.50	0.43	-1.60	-5.03	-9.31	-2.22	2.76	18.37	2.93	370.01
NCB	34.70	0.58	-2.25	-2.80	-3.21	3.89	1.07	9.70	5.48	208.21
Abu Dhabi										
ETISALAT.AD	17.22	-0.35	-0.35	-1.03	1.89	5.51	2.94	10.87	4.82	149.74
FAB.AD	16.06	0.25	0.25	6.92	16.21	16.89	1.39	10.24	4.67	177.40
EMIRATES NBD	23.40	1.74	1.74	13.87	15.84	9.09	1.17	6.73	4.27	147.79
DB ISLAMIC DB	8.16	2.13	2.13	7.94	13.81	15.09	1.30	7.70	5.51	59.08
EMAR.DU	13.50	-0.37	-0.37	3.05	1.12	5.06	1.49	8.34	7.41	119.31
Qatar										
QNB	17.290	-0.12	-0.92	3.53	7.39	0.00	1.40	10.16	4.05	159.32
INDUSTREIS QAT	12.360	0.16	-0.32	-1.59	-4.11	-6.86	2.07	17.79	5.99	74.60
QA ISLAMIC BK	22.300	-0.67	-0.84	5.64	8.41	4.40	1.71	11.91	3.59	52.57
MASRAF AL RAYA	2.314	-0.56	-1.32	3.67	2.84	-6.05	0.88	14.71	4.32	21.47
MESAIEED PETRO	1.389	-0.07	-0.50	-1.49	-3.41	-7.09	1.08	24.54	4.10	17.41
Oman										
BANK MUSCAT	0.274	-0.36	-0.36	7.45	8.30	8.73	0.86	9.97	6.02	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	0.221	-0.90	-1.34	1.84	-9.00	-6.24	0.67	7.09	6.46	0.21

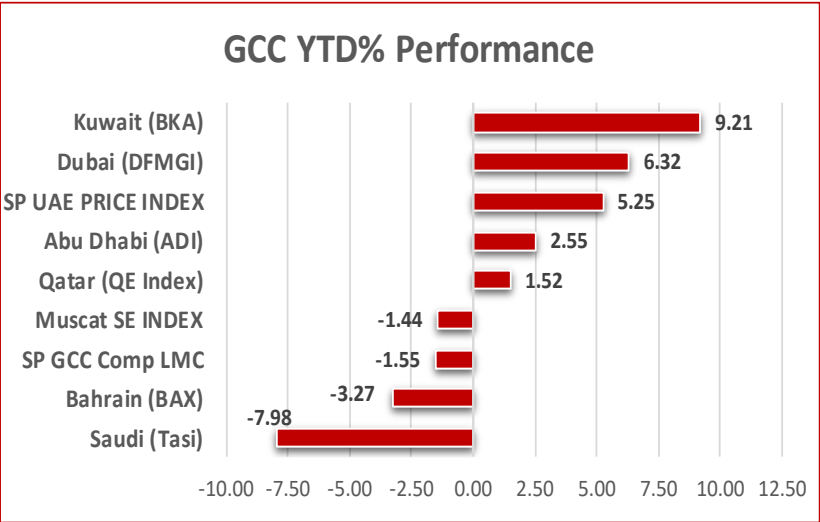
* GCC Markets performance at the latest close.

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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by 0.01%, the highest performing sector today is technology at 0.65%.

KSA

Aramco closed at 0.80%, Sabic closed flat at 0%. STC closed at 0.24% and Al-Rajhi closed at 0.43%.

UAE

ETISALAT.AD closed at -0.35%, FAB.AD closed at 0.25%.



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