



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

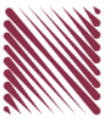
GCC DAILY MORNING BRIEF

Monday, 28th April 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

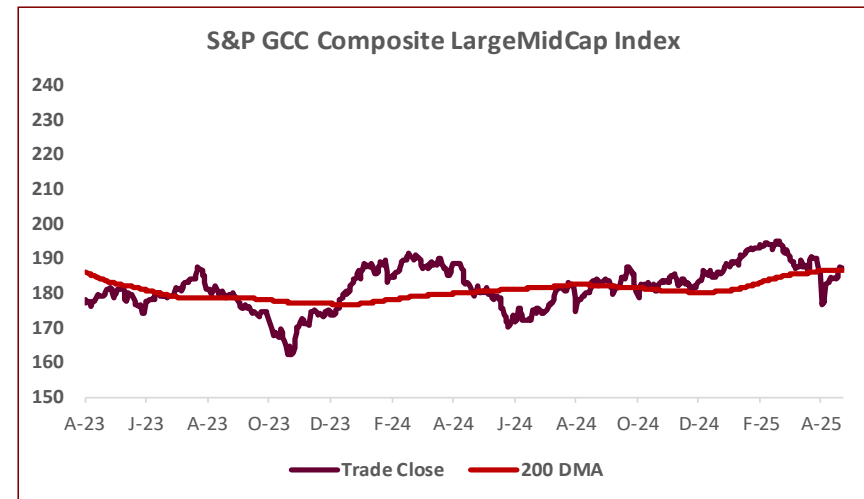


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,756.2	-0.07	-0.07	-2.24	-2.24	-2.33	2.13	16.41	3.70	9,632.66
Qatar (QE Index)	10,269.5	0.09	0.09	0.36	0.36	-2.85	1.16	11.18	4.82	517.60
Dubai (DFMGI)	5,162.6	-0.64	1.29	1.30	1.30	0.08	1.67	9.88	5.46	771.74
Abu Dhabi (ADI)	9,391.8	-0.35	1.23	0.25	0.25	-0.29	1.96	14.70	3.13	2,644.55
Bahrain (BAX)	1,901.1	-0.02	-0.02	-2.57	-2.57	-4.27	0.85	8.47	5.26	7.38
Muscat SE INDEX	4,279.2	0.13	0.13	-2.01	-2.01	-6.50	0.76	8.89	6.68	6.91
SP GCC Comp LMC	187.4	-0.12	-0.12	-1.47	-1.47	-0.26	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	151.4	0.00	0.00	0.45	0.45	-0.57				

Developed Markets										
MSCI World Index	3,618.5	0.62	4.10	-0.28	-0.28	-2.41				
U.S. (S&P 500)	5,525.2	0.74	4.59	-1.54	-1.54	-6.06	4.29	24.40	1.68	49,267.21
U.K. (FTSE 100)	8,415.3	0.05	1.59	-2.04	-2.04	2.87	1.77	16.05	3.64	2,190.54
Japan (topix)	2,628.0	1.37	2.69	-1.15	-1.15	-5.63	1.36	13.36	2.40	916,391.67
Emerging Markets										
MSCI EM Index	1,097.1	0.38	2.67	-0.39	-0.39	2.01				
China (SSE Composite)	3,295.1	-0.07	0.56	-1.22	-1.22	-1.69	1.36	12.00		44,025.04
India (Sensex)	79,212.5	-0.74	0.84	2.32	2.32	1.37	4.29	22.20	1.16	154,484.52

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,915.0	-0.22	-0.22	-1.97	-1.97	7.50	1.62	14.95	3.56	48.20
Kuwait Premier Index	8,487.3	0.05	0.05	-2.16	-2.16	8.27	1.77	16.23	3.46	39.54
Kuwait Main Index	7,188.5	-1.48	-1.48	-1.09	-1.09	4.07	1.16	10.67	4.06	8.66
Kuwait Sector										
Banking	1,990.4	0.18	0.18	-2.63	-2.63	9.98	1.91	16.02	3.09	30.19
Telecom	1,049.1	-0.25	-0.25	-0.08	-0.08	3.08	1.58	11.10	7.21	3.21
Industrials	742.9	-2.68	-2.68	-0.30	-0.30	2.65	1.13	13.72	5.76	2.58
Financial Services	1,459.2	-2.37	-2.37	-3.26	-3.26	-3.40	1.16	12.83	3.26	4.99
Real Estate	1,552.5	0.54	0.54	2.33	2.33	14.73	1.08	17.44	1.91	3.28
Basic Materials	918.6	0.02	0.02	2.20	2.20	0.81	1.63	11.25	9.54	0.52
Health Care	562.5	0.00	0.00	-1.42	-1.42	22.73	1.93	22.17	1.86	
Consumer Staples	1,049.3	5.55	5.55	6.31	6.31	5.07	2.08	19.16	2.58	0.30
Insurance	1,934.4	-0.66	-0.66	-9.28	-9.28	-5.88	0.99	9.48	3.32	0.79
Consumer Discretionary	2,350.7	-0.01	-0.01	-0.42	-0.42	10.73				
Energy	1,392.6	2.34	2.34	5.10	5.10	17.11	1.10	9.58	5.36	0.28
Technology	1,164.0	-1.84	-1.84	8.11	8.11	11.89	1.38			0.02
Utilities	386.8	-0.68	-0.68	-4.55	-4.55	-2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices inched up in early trade on Monday but remained dogged by uncertainty over trade talks between the U.S. and China clouding the outlook for global growth and fuel demand, while the prospect of OPEC+ raising its supply cast more gloom. Brent crude futures and U.S. West Texas Intermediate crude nudged higher for a third session, up 9 cents by 0025 GMT to \$66.96 and \$63.11 a barrel, respectively.

Kuwait Market

The market closed down by -0.22% at 7,915.0 value traded 101.4 million KD, Premier market value reached 53.9 million KD, closed up by 0.05% at 8,487.3.

KSA Market

The market closed down by -0.07% at 11,756.2.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.928	-0.11	-0.11	-7.02	-7.02	8.75	1.82	14.34	3.59	8.11
KFH	0.721	0.28	0.28	-2.05	-2.05	4.38	2.07	16.67	2.83	13.32
ZAIN	0.492	-0.81	-0.81	2.50	2.50	4.90	1.73	10.28	7.11	2.13
BOUBYAN BANK	0.676	0.45	0.45	3.47	3.47	26.52	2.86	32.72	1.41	2.98
AGILITY	0.258	-0.39	-0.39	2.38	2.38	4.45	0.65	10.36	7.75	0.69
Saudi Arabia										
ARAMCO	25.80	0.00	0.00	-3.55	-3.55	-8.02	4.28	15.84	6.88	6,243.60
SABIC	62.00	0.00	0.00	-2.67	-2.67	-7.46	1.19	88.74	5.48	186.00
STC	48.10	0.21	0.21	6.06	6.06	20.25	2.68	22.39	3.95	240.50
AL-RAJHI BANK	98.20	0.00	0.00	-3.73	-3.73	3.81	3.19	21.02	2.76	392.80
NCB	35.30	-1.40	-1.40	-1.53	-1.53	5.69	1.09	10.27	5.38	211.80
Abu Dhabi										
ETISALAT.AD	17.20	0.00	-0.81	1.78	1.78	5.39	3.28	13.91	4.83	149.58
FAB.AD	13.90	-1.00	2.06	0.58	0.58	1.16	1.17	9.41	5.40	153.47
EMIRATES NBD	20.15	-1.47	3.60	-0.25	-0.25	-6.06	1.01	5.79	4.96	127.28
DB ISLAMIC DB	7.45	-1.19	-0.53	3.91	3.91	5.08	1.19	7.03	6.04	53.94
EMAR.DU	12.95	1.97	6.58	-3.00	-3.00	0.78	1.34	8.47	7.72	114.46
Qatar										
QNB	16.080	-0.74	-0.74	-0.12	-0.12	-7.00	1.30	9.45	4.35	148.99
INDUSTREIS QAT	12.370	1.81	1.81	-4.03	-4.03	-6.78	1.98	16.67	5.98	75.07
QA ISLAMIC BK	20.490	-0.05	-0.05	-0.39	-0.39	-4.07	1.57	10.94	3.90	48.57
MASRAF AL RAYA	2.200	0.64	0.64	-2.22	-2.22	-10.68	0.83	13.99	4.55	20.52
MESAIEED PETRO	1.440	3.37	3.37	0.14	0.14	-3.68	1.11	25.17	3.96	18.15
Oman										
BANK MUSCAT	0.253	0.80	0.80	0.00	0.00	0.40	0.78	9.40	6.52	1.90
OMANTEL	0.817	0.37	0.37	-3.88	-3.88	-13.09	0.92	7.94	6.73	0.61
BANK DHOFAR	0.148	0.00	0.00	3.55	3.55	-3.75	0.60	13.52	4.36	0.45
NAT BANK OF OMAN	0.292	0.00	0.00	0.69	0.69	-1.35	0.62	9.43	3.22	0.47
OMINVEST	0.219	-0.45	-0.45	-9.82	-9.82	-7.09	0.64	7.54	6.52	0.20

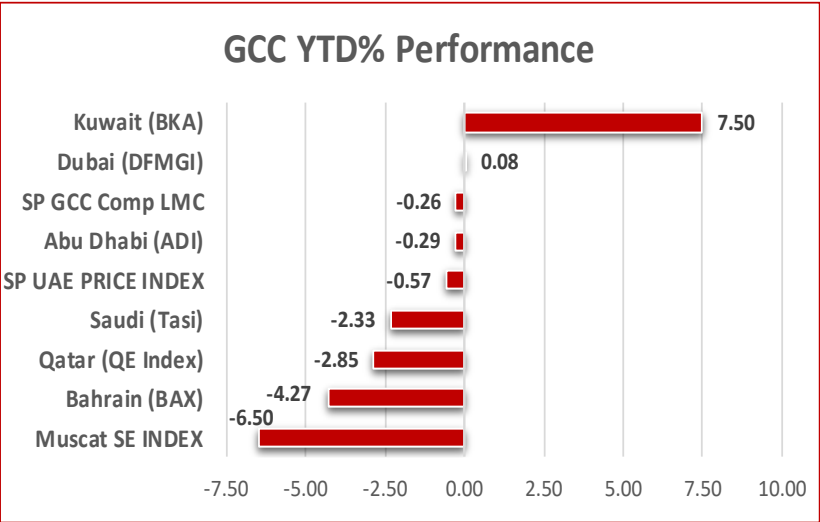
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
16-April. 25	26.09%	14.61%	0.06%	5.76%	9.30%	18.08%	13.62%	6.87%	7.51%
23-April. 25	26.16%	14.55%	0.06%	5.85%	9.19%	18.08%	13.65%	6.90%	7.84%

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 down today by -0.22%, the worst performing sector today is industrials at -2.68%.

KSA

Aramco, Sabic and Al-Rajhi closed flat today at 0%, STC closed at 0.21%.

UAE

ETISALAT.AD closed flat today at 0%, FAB.AD closed at -1.00%.



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