

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 28th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

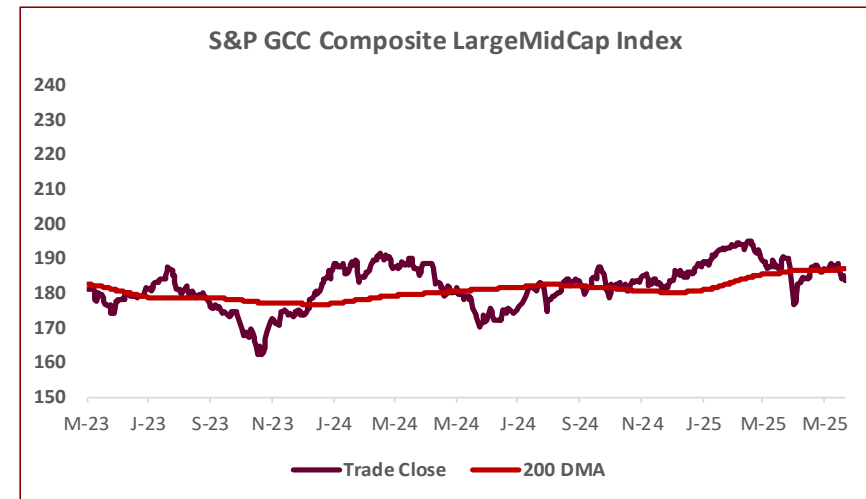


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,925.2	-1.36	-2.36	-6.40	-9.15	-9.23	1.98	15.37	3.91	9,194.22
Qatar (QE Index)	10,648.4	-0.78	-1.17	1.80	4.06	0.73	1.21	11.63	4.63	536.69
Dubai (DFMGI)	5,504.6	0.37	0.74	3.72	8.01	6.71	1.78	10.31	5.10	823.99
Abu Dhabi (ADI)	9,674.0	0.16	0.09	1.46	3.26	2.71	2.05	14.77	3.00	2,717.06
Bahrain (BAX)	1,922.5	0.08	0.01	0.54	-1.48	-3.19	0.84	8.48	5.24	7.46
Muscat SE INDEX	4,529.7	0.42	0.72	4.94	3.72	-1.03	0.80	9.39	6.27	7.36
SP GCC Comp LMC	183.7	-0.70	-1.31	-2.38	-3.42	-2.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	161.0	0.48	0.52	4.09	6.84	5.76				

Developed Markets										
MSCI World Index	3,869.1	1.45	1.74	5.84	6.63	4.35				
U.S. (S&P 500)	5,921.5	2.05	2.05	6.33	5.52	0.68	4.43	25.41	1.61	51,773.43
U.K. (FTSE 100)	8,778.1	0.69	0.69	3.33	2.27	7.40	1.85	16.61	3.43	2,283.43
Japan (topix)	2,769.5	0.64	1.24	3.83	4.17	-0.55	1.42	14.23	2.44	960,780.97
Emerging Markets										
MSCI EM Index	1,164.1	-0.51	-0.59	4.61	5.69	8.24				
China (SSE Composite)	3,340.7	-0.18	-0.23	1.88	0.15	-0.33	1.36	12.00		44,025.04
India (Sensex)	81,551.6	-0.76	-0.21	1.63	5.34	4.37	4.38	23.34	1.19	159,048.02

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,070.0	0.37	0.21	1.39	-0.05	9.61	1.65	15.05	3.47	48.83
Kuwait Premier Index	8,744.2	0.48	0.29	2.23	0.80	11.55	1.82	16.48	3.32	40.59
Kuwait Main Index	6,965.8	-0.19	-0.19	-2.64	-4.15	0.85	1.11	10.13	4.21	8.24
Kuwait Sector										
Banking	2,025.0	0.40	0.41	1.01	-0.94	11.89	1.94	16.31	3.05	30.65
Telecom	1,042.3	0.46	-0.11	1.19	-0.72	2.42	1.56	10.05	7.31	3.17
Industrials	775.3	1.02	0.67	3.02	4.05	7.13	1.19	15.44	4.94	2.60
Financial Services	1,513.0	1.15	0.70	2.28	0.31	0.16	1.16	12.84	3.36	4.99
Real Estate	1,661.5	0.17	0.92	4.43	9.52	22.79	1.16	17.60	1.77	3.52
Basic Materials	902.5	-0.94	-0.89	-0.89	0.40	-0.96	1.67	13.24	8.12	0.51
Health Care	463.2	-12.02	-19.21	-20.21	-18.81	1.08	1.78		1.99	
Consumer Staples	1,117.7	1.07	0.92	6.48	13.24	11.92	2.31	19.96	2.32	0.34
Insurance	1,840.7	0.41	0.85	1.69	-13.67	-10.44	0.93	9.33	3.52	0.74
Consumer Discretionary	2,307.2	-1.25	-3.34	-0.55	-2.26	8.69				
Energy	1,520.2	-0.39	-0.18	9.67	14.73	27.84	1.23	10.05	5.09	0.31
Technology	1,134.9	0.00	2.63	0.65	5.41	9.09	1.32			0.02
Utilities	381.6	1.40	0.00	-2.03	-5.84	-3.97				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

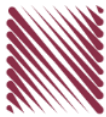
Oil prices fell on Tuesday on increasing expectations members of the Organization of Petroleum Exporting Countries and their allies, known as OPEC+, will decide to increase their output at a meeting later this week. Brent crude futures lost 65 cents, or 1%, to close at \$64.09 a barrel, while U.S. West Texas Intermediate (WTI) crude fell 64 cents, or 1.04%, to settle at \$60.89 a barrel. The WTI contract did not settle on Monday because of the U.S. Memorial Day holiday.

Kuwait Market

The market closed up by 0.37% at 8,070.0 value traded 69.5 million KD, Premier market value reached 47.5 million KD, closed up by 0.48% at 8,744.2.

KSA Market

The market closed down at -1.36% at 10,925.2



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.950	0.85	0.32	-0.21	-4.82	11.33	1.86	14.68	3.51	8.31
KFH	0.745	0.27	0.40	3.04	1.21	7.86	2.14	17.23	2.73	13.78
ZAIN	0.480	0.42	-0.21	1.48	0.00	2.35	1.63	9.18	7.29	2.08
BOUBYAN BANK	0.674	0.30	0.30	-0.74	3.16	26.15	2.85	32.62	1.41	2.98
AGILITY	0.253	2.43	-0.39	-3.80	0.40	2.43	0.66	11.39	3.95	0.68
Saudi Arabia										
ARAMCO	25.05	-0.60	-0.40	-1.18	-6.36	-10.70	4.11	15.69	6.49	6,062.42
SABIC	56.40	-1.91	-4.08	-7.54	-11.46	-15.82	1.08	670.79	6.03	169.21
STC	42.00	-0.47	-1.41	-7.75	-3.18	9.77	2.30	18.54	4.52	210.01
AL-RAJHI BANK	91.00	-1.62	-3.19	-6.57	-10.78	-3.81	2.72	18.07	2.98	364.02
NCB	34.40	-0.86	-3.10	-3.64	-4.04	2.99	1.06	9.61	5.52	206.41
Abu Dhabi										
ETISALAT.AD	17.24	0.12	-0.23	-0.92	2.01	5.64	2.94	10.88	4.81	149.94
FAB.AD	16.14	0.50	0.75	7.46	16.79	17.47	1.40	10.29	4.65	178.32
EMIRATES NBD	23.30	-0.43	1.30	13.38	15.35	8.62	1.16	6.70	4.29	147.19
DB ISLAMIC DB	8.19	0.37	2.50	8.33	14.23	15.51	1.30	7.73	5.49	59.31
EMAR.DU	13.55	0.37	0.00	3.44	1.50	5.45	1.49	8.37	7.38	119.78
Qatar										
QNB	17.100	-1.10	-2.01	2.40	6.21	-1.10	1.39	10.05	4.09	157.92
INDUSTREIS QAT	12.220	-1.13	-1.45	-2.71	-5.20	-7.91	2.05	17.59	6.06	73.92
QA ISLAMIC BK	22.020	-1.26	-2.09	4.31	7.05	3.09	1.69	11.76	3.63	52.02
MASRAF AL RAYA	2.295	-0.82	-2.13	2.82	2.00	-6.82	0.87	14.59	4.36	21.34
MESAIEED PETRO	1.377	-0.86	-1.36	-2.34	-4.24	-7.89	1.07	24.33	4.14	17.30
Oman										
BANK MUSCAT	0.274	0.00	-0.36	7.45	8.30	8.73	0.86	9.97	6.02	2.06
OMANTEL	0.840	0.12	0.12	2.69	-1.18	-10.64	0.98	7.87	6.55	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	0.90	-0.45	2.76	-8.18	-5.39	0.68	7.15	6.41	0.21

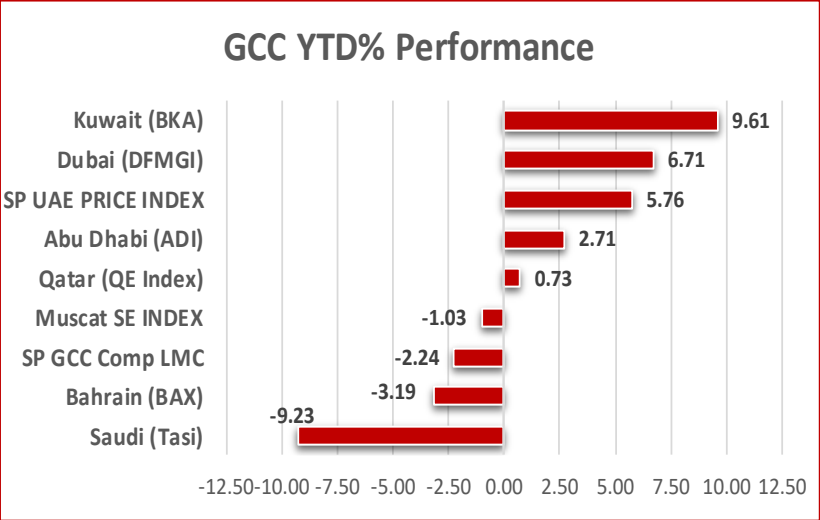
* GCC Markets performance at the latest close.

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 up today by 0.37%, the highest performing sector today is utilities at 1.40%.

KSA

Aramco closed at -0.60%, Sabic closed at -1.91%. STC closed at -0.47% and Al-Rajhi closed at -1.62%.

UAE

ETISALAT.AD closed at 0.12%, FAB.AD closed at 0.50%.



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