



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 29th April 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

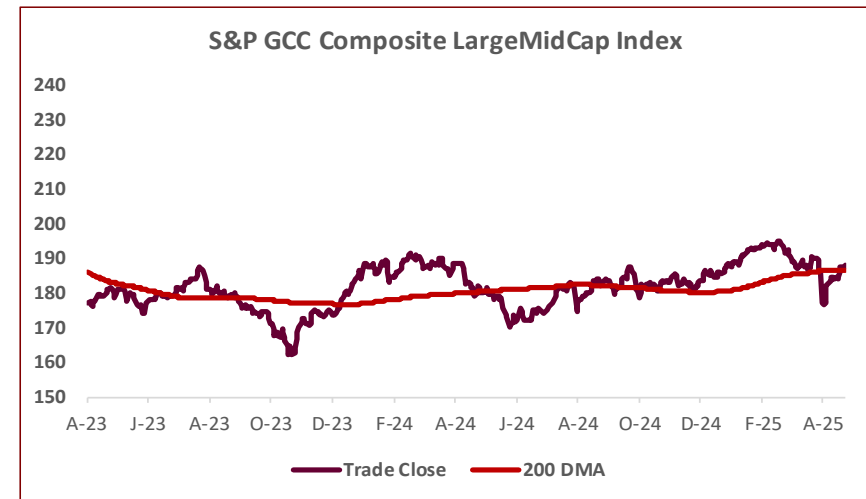


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,784.6	0.24	0.17	-2.00	-2.00	-2.09	2.14	16.45	3.68	9,628.97
Qatar (QE Index)	10,304.2	0.34	0.43	0.70	0.70	-2.53	1.17	11.22	4.80	520.23
Dubai (DFMGI)	5,216.5	1.04	1.04	2.36	2.36	1.12	1.68	9.95	5.41	779.62
Abu Dhabi (ADI)	9,467.7	0.81	0.81	1.06	1.06	0.52	1.98	14.84	3.10	2,658.40
Bahrain (BAX)	1,892.3	-0.47	-0.49	-3.03	-3.03	-4.72	0.84	8.42	5.29	7.35
Muscat SE INDEX	4,292.0	0.30	0.43	-1.72	-1.72	-6.22	0.76	8.92	6.66	6.93
SP GCC Comp LMC	188.1	0.40	0.28	-1.07	-1.07	0.14	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	153.0	1.09	1.09	1.55	1.55	0.51				

Developed Markets										
MSCI World Index	3,628.5	0.28	0.28	0.00	0.00	-2.14				
U.S. (S&P 500)	5,528.8	0.06	0.06	-1.48	-1.48	-6.00	4.29	24.34	1.68	49,267.21
U.K. (FTSE 100)	8,417.3	0.02	0.02	-1.93	-1.93	2.99	1.78	16.06	3.64	2,191.21
Japan (topix)	2,650.6	0.86	0.86	-0.31	-0.31	-4.82	1.37	13.47	2.39	924,792.60
Emerging Markets										
MSCI EM Index	1,102.6	0.50	0.50	0.11	0.11	2.52				
China (SSE Composite)	3,288.4	-0.20	-0.20	-1.42	-1.42	-1.89	1.36	12.00		44,025.04
India (Sensex)	80,218.4	1.27	1.27	3.62	3.62	2.66	4.35	22.47	1.15	156,524.68

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,901.2	-0.17	-0.39	-2.14	-2.14	7.32	1.62	14.89	3.58	48.10
Kuwait Premier Index	8,461.8	-0.30	-0.25	-2.46	-2.46	7.95	1.78	16.24	3.46	39.56
Kuwait Main Index	7,219.0	0.43	-1.07	-0.67	-0.67	4.51	1.15	10.40	4.15	8.54
Kuwait Sector										
Banking	1,983.6	-0.34	-0.16	-2.96	-2.96	9.60	1.91	16.04	3.08	30.25
Telecom	1,053.6	0.43	0.18	0.36	0.36	3.53	1.58	10.83	7.23	3.21
Industrials	734.7	-1.10	-3.74	-1.39	-1.39	1.53	1.10	13.33	5.92	2.52
Financial Services	1,469.3	0.69	-1.69	-2.59	-2.59	-2.73	1.13	12.50	3.34	4.87
Real Estate	1,566.0	0.87	1.41	3.22	3.22	15.73	1.08	17.51	1.89	3.30
Basic Materials	912.3	-0.69	-0.68	1.49	1.49	0.11	1.63	11.25	9.93	0.52
Health Care	562.5	0.00	0.00	-1.42	-1.42	22.73	1.93	22.17	1.86	
Consumer Staples	1,031.2	-1.73	3.72	4.47	4.47	3.25	2.19	20.29	2.45	0.32
Insurance	1,907.2	-1.41	-2.06	-10.55	-10.55	-7.20	0.98	9.41	3.34	0.78
Consumer Discretionary	2,344.9	-0.25	-0.25	-0.67	-0.67	10.46				
Energy	1,365.6	-1.93	0.36	3.07	3.07	14.84	1.12	9.81	5.24	0.28
Technology	1,171.3	0.62	-1.23	8.78	8.78	12.59	1.36			0.02
Utilities	386.8	0.00	-0.68	-4.55	-4.55	-2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Crude oil prices fell in early Asian trading on Tuesday as investors lowered their demand growth expectations due to the ongoing trade war between the United States and China, the world's two biggest economies. Brent crude futures fell by 25 cents, or 0.4%, to \$65.61 per barrel.

Kuwait Market

The market closed down by -0.17% at 7,901.2 value traded 107.8 million KD, Premier market value reached 69.2 million KD, closed down by -0.30% at 8,461.8.

KSA Market

The market closed up by 0.24% at 11,784.6.



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.923	-0.54	-0.65	-7.52	-7.52	8.16	1.81	14.26	3.61	8.07
KFH	0.718	-0.42	-0.14	-2.46	-2.46	3.95	2.06	16.60	2.84	13.27
ZAIN	0.495	0.61	-0.20	3.13	3.13	5.54	1.74	10.35	7.07	2.14
BOUBYAN BANK	0.670	-0.89	-0.45	2.55	2.55	25.40	2.83	32.43	1.42	2.96
AGILITY	0.257	-0.39	-0.77	1.98	1.98	4.05	0.65	10.32	7.78	0.69
Saudi Arabia										
ARAMCO	25.75	-0.19	-0.19	-3.74	-3.74	-8.20	4.27	15.81	6.90	6,231.50
SABIC	61.70	-0.48	-0.48	-3.14	-3.14	-7.91	1.18	88.31	5.51	185.10
STC	48.00	-0.21	0.00	5.84	5.84	20.00	2.68	22.35	3.96	240.00
AL-RAJHI BANK	98.90	0.71	0.71	-3.04	-3.04	4.55	3.22	21.17	2.74	395.60
NCB	35.50	0.57	-0.84	-0.98	-0.98	6.29	1.10	10.33	5.35	213.00
Abu Dhabi										
ETISALAT.AD	17.32	0.70	0.70	2.49	2.49	6.13	3.31	14.01	4.79	150.62
FAB.AD	14.10	1.44	1.44	2.03	2.03	2.62	1.19	9.54	5.32	155.68
EMIRATES NBD	20.25	0.50	0.50	0.25	0.25	-5.59	1.01	5.82	4.94	127.91
DB ISLAMIC DB	7.50	0.67	0.67	4.60	4.60	5.78	1.19	7.08	6.00	54.30
EMAR.DU	13.15	1.54	1.54	-1.50	-1.50	2.33	1.36	8.60	7.60	116.23
Qatar										
QNB	16.200	0.75	0.00	0.62	0.62	-6.30	1.31	9.52	4.32	149.33
INDUSTREIS QAT	12.530	1.29	3.13	-2.79	-2.79	-5.58	2.01	16.88	5.91	75.65
QA ISLAMIC BK	20.350	-0.68	-0.73	-1.07	-1.07	-4.73	1.56	10.87	3.93	47.99
MASRAF AL RAYA	2.212	0.55	1.19	-1.69	-1.69	-10.19	0.84	14.07	4.52	20.53
MESAIEED PETRO	1.432	-0.56	2.80	-0.42	-0.42	-4.21	1.10	25.03	3.98	17.95
Oman										
BANK MUSCAT	0.254	0.40	1.20	0.40	0.40	0.79	0.78	9.44	6.50	1.91
OMANTEL	0.815	-0.24	0.12	-4.12	-4.12	-13.30	0.92	7.92	6.75	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	0.48
OMINVEST	0.215	-1.83	-2.27	-11.47	-11.47	-8.79	0.62	7.40	6.64	0.20

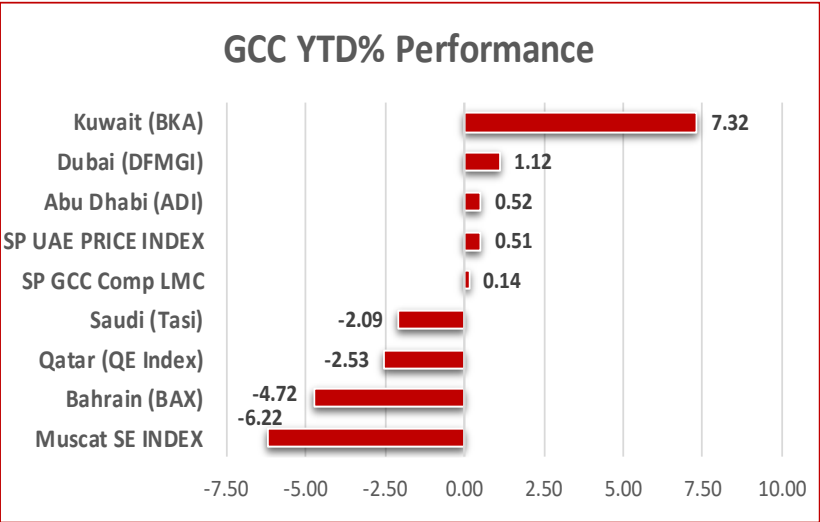
* GCC Markets performance at the latest close.

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

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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 worst performing sector today is Energy at -1.93%.

KSA

Aramco closed at -0.19%, Sabc closed at -0.48%. STC closed at -0.21% and Al-Rajhi closed at 0.71%,

UAE

ETISALAT.AD closed at 0.70%, FAB.AD closed at 1.44%.



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