

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, 29th May 2025



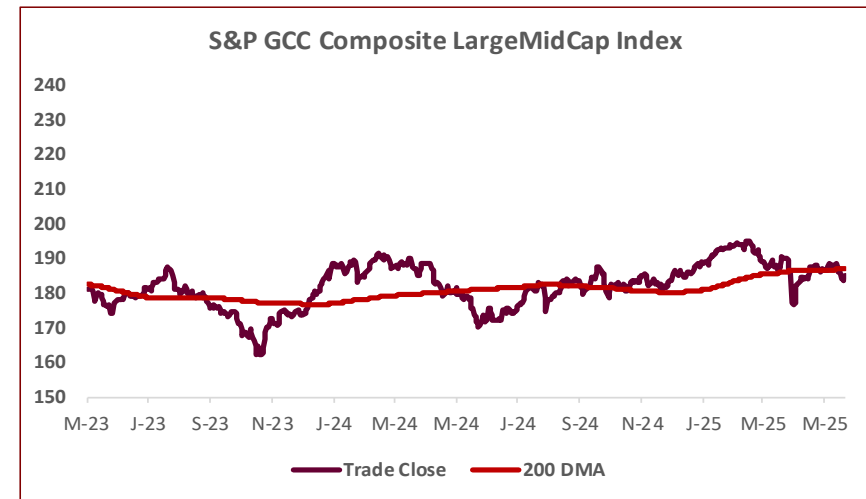


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,052.8	1.17	-1.22	-5.30	-8.09	-8.17	2.01	15.56	3.87	9,323.08
Qatar (QE Index)	10,539.4	-1.02	-2.18	0.76	2.99	-0.30	1.20	11.52	4.68	531.97
Dubai (DFMGI)	5,526.5	0.40	1.14	4.13	8.44	7.13	1.79	10.33	5.09	825.79
Abu Dhabi (ADI)	9,743.5	0.72	0.81	2.19	4.00	3.44	2.06	14.91	2.97	2,736.53
Bahrain (BAX)	1,920.7	-0.09	-0.09	0.45	-1.57	-3.28	0.84	8.46	5.25	7.46
Muscat SE INDEX	4,517.4	-0.27	0.44	4.66	3.44	-1.29	0.80	9.37	6.29	7.35
SP GCC Comp LMC	183.7	0.00	-1.31	-2.38	-3.42	-2.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	161.0	0.00	0.52	4.09	6.84	5.76				

Developed Markets										
MSCI World Index	3,845.7	-0.60	1.13	5.20	5.98	3.72				
U.S. (S&P 500)	5,888.6	-0.56	1.48	5.74	4.93	0.12	4.53	25.94	1.58	52,838.50
U.K. (FTSE 100)	8,726.0	-0.59	0.09	2.72	1.67	6.77	1.83	16.51	3.45	2,267.02
Japan (topix)	2,769.5	0.00	1.24	3.83	4.17	-0.55	1.42	14.23	2.44	960,654.31
Emerging Markets										
MSCI EM Index	1,163.8	-0.02	-0.61	4.58	5.67	8.22				
China (SSE Composite)	3,339.9	-0.02	-0.25	1.86	0.13	-0.35	1.36	12.00		44,025.04
India (Sensex)	81,312.3	-0.29	-0.50	1.33	5.03	4.06	4.37	23.27	1.19	158,563.91

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,119.3	0.61	0.82	2.01	0.56	10.28	1.65	15.10	3.45	49.01
Kuwait Premier Index	8,808.1	0.73	1.03	2.98	1.54	12.37	1.83	16.56	3.30	40.79
Kuwait Main Index	6,966.3	0.01	-0.18	-2.64	-4.15	0.86	1.11	10.11	4.22	8.22
Kuwait Sector										
Banking	2,041.9	0.84	1.25	1.86	-0.11	12.83	1.95	16.37	3.04	30.77
Telecom	1,041.0	-0.13	-0.24	1.06	-0.85	2.29	1.57	10.09	7.28	3.19
Industrials	782.4	0.92	1.59	3.97	5.01	8.12	1.20	15.59	4.88	2.63
Financial Services	1,515.7	0.17	0.87	2.46	0.48	0.34	1.18	12.98	3.32	5.05
Real Estate	1,643.9	-1.06	-0.15	3.33	8.36	21.49	1.16	17.65	1.76	3.53
Basic Materials	910.3	0.87	-0.03	-0.03	1.27	-0.10	1.65	13.11	8.20	0.51
Health Care	491.2	6.02	-14.35	-15.41	-13.92	7.17	1.56		2.26	
Consumer Staples	1,117.6	-0.01	0.91	6.47	13.23	11.91	2.34	20.17	2.30	0.34
Insurance	1,842.5	0.10	0.94	1.78	-13.59	-10.35	0.94	9.36	3.51	0.74
Consumer Discretionary	2,354.4	2.04	-1.37	1.48	-0.26	10.91				
Energy	1,524.8	0.31	0.13	10.01	15.09	28.23	1.23	10.00	5.11	0.31
Technology	1,120.4	-1.28	1.32	-0.64	4.05	7.69	1.32			0.02
Utilities	379.0	-0.69	-0.69	-2.70	-6.49	-4.64				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday after a U.S. court blocked President Donald Trump's tariffs from taking effect, while the market was watching out for potential new U.S. sanctions curbing Russian crude flows and an OPEC+ decision on hiking output in July. Brent crude futures climbed 81 cents, or 1.25%, to \$65.71 a barrel. U.S. West Texas Intermediate crude advanced by 83 cents, or 1.34%, to \$62.62 a barrel at 0102 GMT.

Kuwait Market

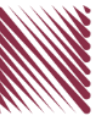
The market closed up by 0.61% at 8,119.3 value traded 90.2 million KD, Premier market value reached 68.9 million KD, closed up by 0.73% at 8,808.1.

KSA Market

The market closed down at 1.17% at 11,052.8

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	0.965	1.58	1.90	1.37	-3.32	13.09	1.89	14.91	3.45	8.44
KFH	0.750	0.67	1.08	3.73	1.89	8.58	2.15	17.35	2.72	13.87
ZAIN	0.479	-0.21	-0.42	1.27	-0.21	2.13	1.62	9.16	7.31	2.07
BOUBYAN BANK	0.676	0.30	0.60	-0.44	3.47	26.52	2.86	32.72	1.41	2.98
AGILITY	0.253	0.00	-0.39	-3.80	0.40	2.43	0.66	11.39	3.95	0.68
Saudi Arabia										
ARAMCO	25.45	1.60	1.19	0.39	-4.86	-9.27	4.18	15.94	6.39	6,158.90
SABIC	56.60	0.35	-3.74	-7.21	-11.15	-15.52	1.09	673.17	6.01	169.80
STC	42.25	0.60	-0.82	-7.20	-2.60	10.43	2.31	18.65	4.50	211.25
AL-RAJHI BANK	93.20	2.42	-0.85	-4.31	-8.63	-1.48	2.78	18.51	2.91	372.80
NCB	34.55	0.44	-2.68	-3.22	-3.63	3.44	1.06	9.65	5.50	207.30
Abu Dhabi										
ETISALAT.AD	17.24	0.00	-0.23	-0.92	2.01	5.64	2.94	10.88	4.81	149.94
FAB.AD	16.60	2.85	3.62	10.52	20.12	20.82	1.44	10.58	4.52	183.40
EMIRATES NBD	23.40	0.43	1.74	13.87	15.84	9.09	1.17	6.73	4.27	147.82
DB ISLAMIC DB	8.25	0.73	3.25	9.13	15.06	16.36	1.31	7.79	5.45	59.74
EMAR.DU	13.50	-0.37	-0.37	3.05	1.12	5.06	1.49	8.34	7.41	119.33
Qatar										
QNB	17.050	-0.29	-2.29	2.10	5.90	-1.39	1.38	10.02	4.11	157.49
INDUSTREIS QAT	12.120	-0.82	-2.26	-3.50	-5.97	-8.67	2.03	17.45	6.11	73.33
QA ISLAMIC BK	21.500	-2.36	-4.40	1.85	4.52	0.66	1.65	11.48	3.72	50.80
MASRAF AL RAYA	2.269	-1.13	-3.24	1.66	0.84	-7.88	0.86	14.43	4.41	21.10
MESAIEED PETRO	1.373	-0.29	-1.65	-2.62	-4.52	-8.16	1.07	24.26	4.15	17.25
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	0.00	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	0.285	-3.39	-3.39	-3.39	-1.72	-3.72	0.60	8.92	3.30	0.46
OMINVEST	0.220	-1.35	-1.79	1.38	-9.41	-6.67	0.67	7.06	6.49	0.21

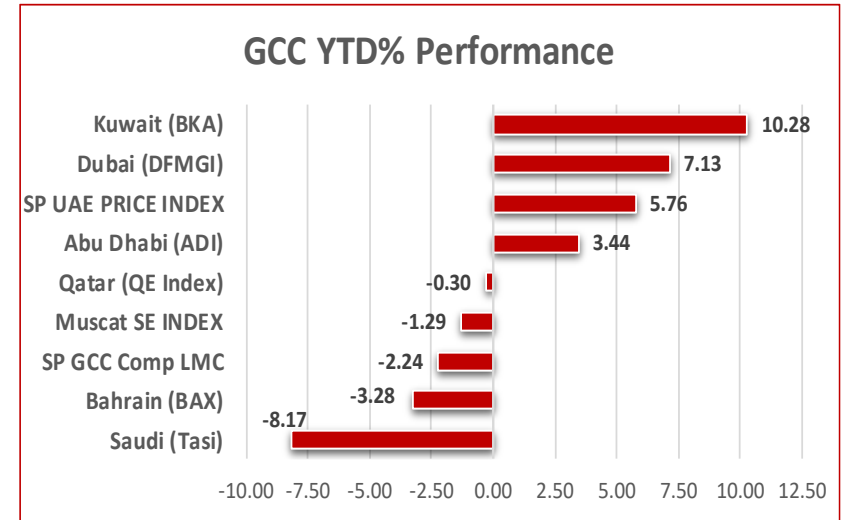
* GCC Markets performance at the latest close.

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 0.61%, the highest performing sector today is health care at 6.02%.

KSA

Aramco closed at 1.60%, Sabic closed at 0.35%. STC closed at 0.60% and Al-Rajhi closed at 2.42%.

UAE

ETISALAT.AD closed flat at 0%, FAB.AD closed at 2.85%.



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