



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 2nd March 2025



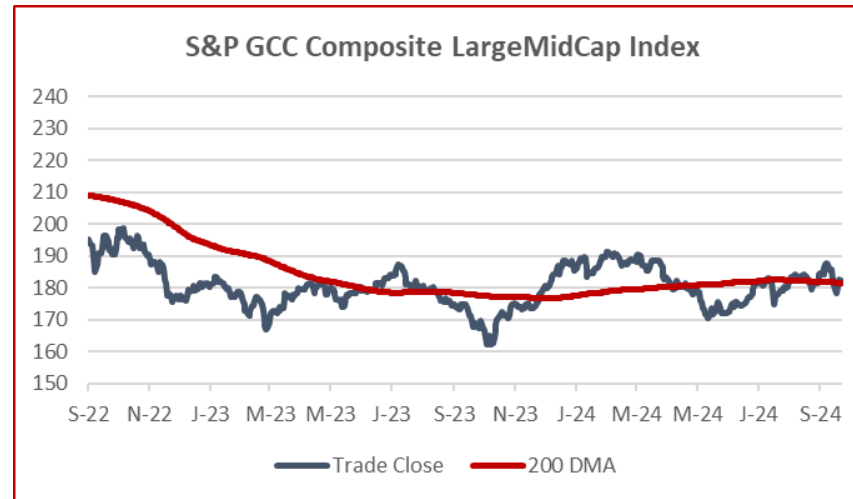


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,111.9	-0.99	-2.23	-2.45	0.63	0.63	2.19	17.93	3.51	10,001.85
Qatar (QE Index)	10,445.7	-0.50	-1.96	-2.07	-1.19	-1.19	1.18	11.32	4.74	527.81
Dubai (DFMGI)	5,317.6	-0.81	-0.78	2.65	3.08	3.08	1.71	10.22	5.31	796.06
Abu Dhabi (ADI)	9,564.6	-0.50	-0.56	-0.22	1.55	1.55	2.42	18.49	2.25	2,702.44
Bahrain (BAX)	1,960.2	0.08	1.04	4.30	-1.29	-1.29	0.87	8.84	5.00	7.46
Muscat SE INDEX	4,435.9	0.46	-0.18	-2.36	-3.08	-3.08	0.78	9.29	6.13	7.13
SP GCC Comp LMC	191.8	-0.27	-1.72	-0.59	2.10	2.10	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.4	-1.21	-1.28	0.34	2.73	2.73				

Developed Markets										
MSCI World Index	3,805.3	1.01	-0.98	-0.81	2.63	2.63				
U.S. (S&P 500)	5,954.5	1.59	-0.98	-1.42	1.24	1.24	4.66	26.73	1.54	53,095.08
U.K. (FTSE 100)	8,809.7	0.61	1.74	1.57	7.79	7.79	1.78	16.70	3.51	2,271.07
Japan (topix)	2,682.1	-1.98	-1.99	-3.82	-3.69	-3.69	1.40	13.58	2.34	934,913.73
Emerging Markets										
MSCI EM Index	1,097.3	-2.38	-4.36	0.36	2.03	2.03				
China (SSE Composite)	3,320.9	-1.98	-1.72	2.16	-0.92	-0.92	1.36	12.00		44,025.04
India (Sensex)	73,198.1	-1.90	-2.81	-5.55	-6.32	-6.32	3.96	20.63	1.23	142,985.21

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,101.2	0.11	-0.51	4.07	10.03	10.03	1.66	15.85	3.44	48.80
Kuwait Premier Index	8,693.1	0.03	-0.21	4.73	10.90	10.90	1.80	16.84	3.31	40.08
Kuwait Main Index	7,334.9	0.50	-1.91	1.08	6.19	6.19	1.22	12.14	4.07	8.72
Kuwait Sector										
Banking	2,029.0	-0.22	-0.41	4.48	12.11	12.11	1.99	17.42	2.93	30.39
Telecom	1,068.9	0.09	-1.12	5.50	5.03	5.03	1.59	12.54	7.86	3.27
Industrials	762.8	0.38	-0.10	3.58	5.42	5.42	0.85	12.06	5.66	2.59
Financial Services	1,568.8	1.25	-0.12	1.99	3.85	3.85	1.28	13.17	2.64	5.24
Real Estate	1,562.5	0.72	1.28	3.98	15.48	15.48	1.17	17.79	1.87	3.33
Basic Materials	931.9	1.00	0.17	5.74	2.27	2.27	1.68	11.48	9.40	0.53
Health Care	519.3	0.00	0.00	12.01	13.31	13.31	1.74	17.55	2.02	
Consumer Staples	1,036.4	-0.03	-1.24	0.47	3.78	3.78	2.25	21.12	1.98	0.31
Insurance	2,064.8	-0.39	-1.12	1.12	0.46	0.46	1.08	10.43	3.97	0.84
Consumer Discretionary	2,323.7	0.98	-6.46	1.76	9.46	9.46				
Energy	1,364.5	0.66	-0.68	2.72	14.75	14.75	1.13	10.33	4.65	0.28
Technology	1,615.1	4.72	12.69	54.17	55.25	55.25	1.87			0.02
Utilities	407.9	0.65	1.31	1.97	2.65	2.65				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell about 1% on Friday, posting their first monthly drop since November, as markets braced for Washington's new tariffs and Iraq's decision to resume oil exports from the Kurdistan region. Uncertainty surrounding OPEC's production resumption plans in April and ongoing talks to end the war in Ukraine also weighed on investor sentiment. The more active May Brent crude futures fell 86 cents, or 1.16%, to close at \$73.18 a barrel.

Kuwait Market

The market closed up by 0.11% at 8,101.2 value traded 96.5 million KD, Premier market value reached 68.6 million KD, closed up by 0.03% at 8,693.1

KSA Market

The market closed down by -0.99% at 12,111.9

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	1.030	-0.77	-0.39	6.85	14.96	14.96	1.88	14.83	3.40	8.58
KFH	0.801	-0.62	-0.99	1.91	7.37	7.37	2.25	17.27	2.75	13.70
ZAIN	0.491	0.20	-1.21	8.15	4.69	4.69	1.85	11.88	7.13	2.12
BOUBYAN BANK	0.670	1.06	0.15	6.69	19.43	19.43	2.65	31.00	1.49	2.81
AGILITY	0.273	1.11	-0.73	8.33	10.53	10.53	0.71	11.39	7.33	0.73
Saudi Arabia										
ARAMCO	27.10	-0.37	-2.17	-2.52	-3.39	-3.39	4.40	15.99	7.11	6,558.20
SABIC	62.00	-3.13	-5.49	-7.46	-7.46	-7.46	1.12	75.28	5.48	186.00
STC	45.25	-2.27	1.00	4.02	13.13	13.13	2.85	17.77	3.87	226.25
AL-RAJHI BANK	99.80	-0.99	-0.40	0.81	5.50	5.50	3.24	21.36	2.40	399.20
NCB	35.00	-1.69	-2.10	2.34	4.79	4.79	1.08	10.18	5.43	210.00
Abu Dhabi										
ETISALAT.AD	17.02	-2.00	0.48	-2.46	2.21	2.21	3.18	13.49	4.89	145.06
FAB.AD	14.64	-2.73	-0.42	-2.06	3.64	3.64	1.20	9.64	5.27	157.23
EMIRATES NBD	22.10	0.45	5.74	6.00	3.03	3.03	1.11	6.21	4.52	139.60
DB ISLAMIC DB	7.73	0.65	0.52	0.39	9.03	9.03	1.12	7.44	5.82	55.97
EMAR.DU	13.55	-2.52	-4.24	0.37	5.45	5.45	1.40	8.86	7.38	119.77
Qatar										
QNB	16.600	1.84	-0.90	-0.60	-3.99	-3.99	1.36	9.84	4.22	153.32
INDUSTREIS QAT	13.230	-0.53	-1.19	-3.64	-0.30	-0.30	2.12	17.83	5.59	80.04
QA ISLAMIC BK	20.830	-2.11	-2.85	1.12	-2.48	-2.48	1.58	11.22	3.84	49.22
MASRAF AL RAYA	2.320	-2.11	-3.29	-2.85	-5.81	-5.81	0.86	14.77	4.31	21.58
MESAIEED PETRO	1.429	1.20	-3.25	-6.60	-4.41	-4.41	1.10	24.98	3.99	17.95
Oman										
BANK MUSCAT	0.254	0.00	-0.39	-0.78	0.79	0.79	0.78	9.44	6.10	1.91
OMANTEL	0.822	-0.24	-4.42	-8.57	-12.55	-12.55	0.97	9.73	7.30	0.62
BANK DHOFAR	0.151	0.00	0.00	0.00	-3.21	-3.21	0.61	13.71	5.30	0.45
NAT BANK OF OMAN	0.280	0.00	-3.45	-4.76	-5.41	-5.41	0.59	9.04	3.36	0.46
OMINVEST	0.334	3.73	3.73	1.21	1.21	1.21	0.71	7.59	5.99	0.22

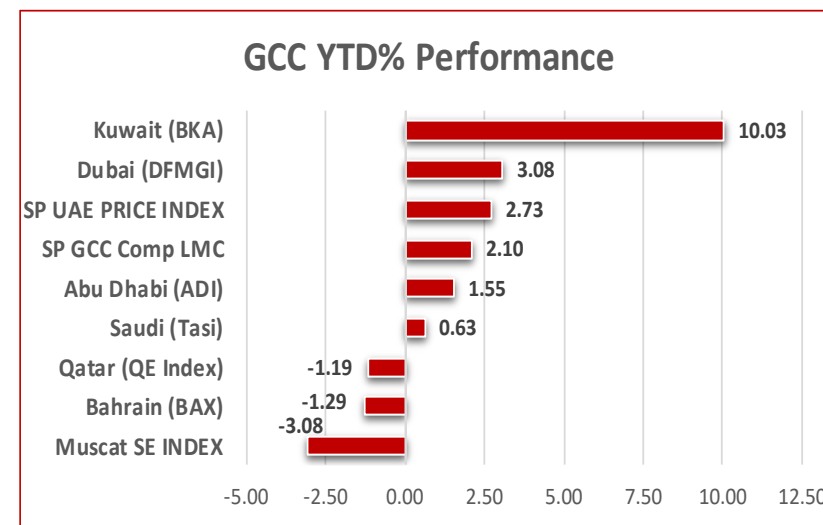
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
12-Feb. 25	25.11%	15.37%	0.06%	3.99%	9.17%	17.96%	13.38%	6.49%	6.54%
19-Feb. 25	25.23%	15.60%	0.06%	4.05%	9.25%	17.96%	13.46%	6.60%	6.78%

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 0.11%, the best performing sector today is technology at 4.72%.

KSA

Aramco closed today down by -0.37%, Sabic closed at -3.13%, STC closed at -2.27% and Al Rajhi closed at -0.99%.

UAE

ETISALAT.AD had a negative performance today at -2.0%, FAB.AD had a negative performance at -2.73%.



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