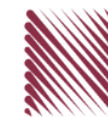


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, 30th April 2025



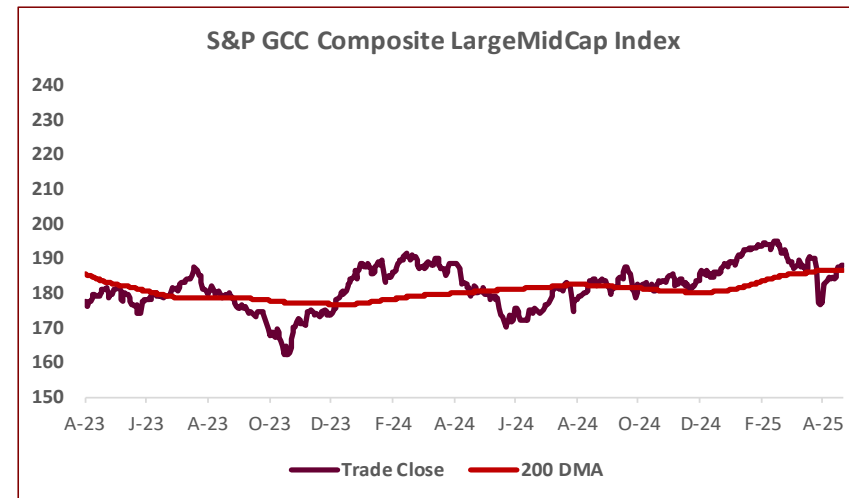


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,746.2	-0.33	-0.15	-2.32	-2.32	-2.41	2.13	16.35	3.70	9,594.96
Qatar (QE Index)	10,325.3	0.21	0.63	0.90	0.90	-2.33	1.17	11.26	4.79	521.23
Dubai (DFMGI)	5,241.3	0.48	1.52	2.85	2.85	1.60	1.69	9.98	5.40	783.02
Abu Dhabi (ADI)	9,527.5	0.63	1.44	1.69	1.69	1.15	2.00	14.98	3.08	2,671.68
Bahrain (BAX)	1,902.7	0.55	0.06	-2.50	-2.50	-4.19	0.84	8.46	5.26	7.38
Muscat SE INDEX	4,297.8	0.14	0.57	-1.58	-1.58	-6.09	0.76	8.92	6.65	6.95
SP GCC Comp LMC	188.2	0.02	0.30	-1.05	-1.05	0.16	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	154.3	0.84	1.94	2.40	2.40	1.36				

Developed Markets										
MSCI World Index	3,647.2	0.52	0.79	0.51	0.51	-1.64				
U.S. (S&P 500)	5,560.8	0.58	0.64	-0.91	-0.91	-5.45	4.29	24.36	1.68	49,304.66
U.K. (FTSE 100)	8,463.5	0.55	0.57	-1.39	-1.39	3.55	1.79	16.00	3.60	2,202.10
Japan (topix)	2,650.6	0.86	0.86	-0.31	-0.31	-4.82	1.37	13.47	2.39	925,634.77
Emerging Markets										
MSCI EM Index	1,106.0	0.31	0.81	0.42	0.42	2.84				
China (SSE Composite)	3,286.7	-0.05	-0.26	-1.47	-1.47	-1.94	1.36	12.00		44,025.04
India (Sensex)	80,288.4	0.09	1.36	3.71	3.71	2.75	4.35	22.49	1.15	156,786.80

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,917.9	0.21	-0.18	-1.93	-1.93	7.54	1.62	14.86	3.58	48.02
Kuwait Premier Index	8,487.7	0.31	0.06	-2.16	-2.16	8.28	1.77	16.19	3.47	39.44
Kuwait Main Index	7,202.1	-0.24	-1.30	-0.90	-0.90	4.27	1.15	10.45	4.13	8.58
Kuwait Sector										
Banking	1,984.9	0.07	-0.10	-2.90	-2.90	9.67	1.91	15.99	3.09	30.15
Telecom	1,059.3	0.54	0.72	0.89	0.89	4.08	1.58	10.87	7.20	3.22
Industrials	744.3	1.30	-2.49	-0.11	-0.11	2.85	1.09	13.18	5.98	2.49
Financial Services	1,475.1	0.39	-1.30	-2.21	-2.21	-2.35	1.14	12.58	3.32	4.90
Real Estate	1,575.1	0.58	2.00	3.82	3.82	16.40	1.09	17.69	1.87	3.33
Basic Materials	914.3	0.23	-0.45	1.72	1.72	0.34	1.62	11.17	9.99	0.51
Health Care	580.6	3.23	3.23	1.75	1.75	26.69	1.93	22.17	1.86	
Consumer Staples	1,064.0	3.18	7.02	7.80	7.80	6.54	2.16	19.93	2.49	0.31
Insurance	1,853.1	-2.83	-4.84	-13.09	-13.09	-9.83	0.97	9.28	3.39	0.77
Consumer Discretionary	2,336.1	-0.37	-0.62	-1.04	-1.04	10.05				
Energy	1,370.2	0.34	0.70	3.42	3.42	15.23	1.10	9.63	5.34	0.28
Technology	1,113.1	-4.97	-6.13	3.38	3.38	6.99	1.36			0.02
Utilities	389.5	0.68	0.00	-3.90	-3.90	-1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged lower in early Asian trading on Wednesday as President Donald Trump's erratic tariff policies raised concerns about weakening global economic growth and fuel demand. Brent crude futures fell by 17 cents, or 0.26%, to \$64.08 per barrel by 0015 GMT. U.S. West Texas Intermediate crude futures dropped 12 cents, or 0.2%, to \$60.3 a barrel. Both benchmarks posted their lowest settlement prices since April 10 in the previous session.

Kuwait Market

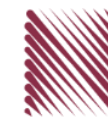
The market closed up by 0.21% at 7,917.9 value traded 112.1 million KD, Premier market value reached 57.5 million KD, closed up by 0.31% at 8,487.7.

KSA Market

The market closed down by -0.33% at 11,746.2.

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	0.924	0.11	-0.54	-7.42	-7.42	8.28	1.81	14.28	3.61	8.06
KFH	0.719	0.14	0.00	-2.32	-2.32	4.09	2.06	16.63	2.83	13.26
ZAIN	0.496	0.20	0.00	3.33	3.33	5.76	1.75	10.37	7.06	2.14
BOUBYAN BANK	0.672	0.30	-0.15	2.86	2.86	25.78	2.84	32.53	1.42	2.96
AGILITY	0.261	1.56	0.77	3.57	3.57	5.67	0.66	10.48	7.66	0.70
Saudi Arabia										
ARAMCO	25.65	-0.39	-0.58	-4.11	-4.11	-8.56	4.25	15.75	6.92	6,206.64
SABIC	61.40	-0.49	-0.97	-3.61	-3.61	-8.36	1.17	87.89	5.54	184.18
STC	47.40	-1.25	-1.25	4.52	4.52	18.50	2.64	22.07	4.01	236.97
AL-RAJHI BANK	98.70	-0.20	0.51	-3.24	-3.24	4.33	3.21	21.13	2.75	394.76
NCB	35.60	0.28	-0.56	-0.70	-0.70	6.59	1.10	10.36	5.34	213.58
Abu Dhabi										
ETISALAT.AD	17.46	0.81	1.51	3.31	3.31	6.99	3.33	14.12	4.75	151.85
FAB.AD	14.54	3.12	4.60	5.21	5.21	5.82	1.23	9.84	5.16	160.54
EMIRATES NBD	20.40	0.74	1.24	0.99	0.99	-4.90	1.02	5.87	4.90	128.86
DB ISLAMIC DB	7.50	0.00	0.67	4.60	4.60	5.78	1.19	7.08	6.00	54.31
EMAR.DU	13.20	0.38	1.93	-1.12	-1.12	2.72	1.37	8.63	7.58	116.67
Qatar										
QNB	16.350	0.93	0.93	1.55	1.55	-5.44	1.33	9.61	4.28	150.87
INDUSTREIS QAT	12.350	-1.44	1.65	-4.19	-4.19	-6.93	1.98	16.64	5.99	74.64
QA ISLAMIC BK	20.800	2.21	1.46	1.12	1.12	-2.62	1.59	11.11	3.85	49.10
MASRAF AL RAYA	2.230	0.81	2.01	-0.89	-0.89	-9.46	0.84	14.18	4.48	20.72
MESAIEED PETRO	1.416	-1.12	1.65	-1.53	-1.53	-5.28	1.09	24.75	4.03	17.77
Oman										
BANK MUSCAT	0.255	0.39	1.59	0.79	0.79	1.19	0.78	9.48	6.47	1.91
OMANTEL	0.818	0.37	0.49	-3.76	-3.76	-12.98	0.92	7.95	6.72	0.61
BANK DHOFAR	0.148	0.00	0.00	3.55	3.55	-3.75	0.62	12.98	4.36	0.45
NAT BANK OF OMAN	0.295	1.03	1.03	1.72	1.72	-0.34	0.62	9.53	3.19	0.48
OMINVEST	0.210	-2.33	-4.55	-13.53	-13.53	-10.91	0.61	7.23	6.80	0.20

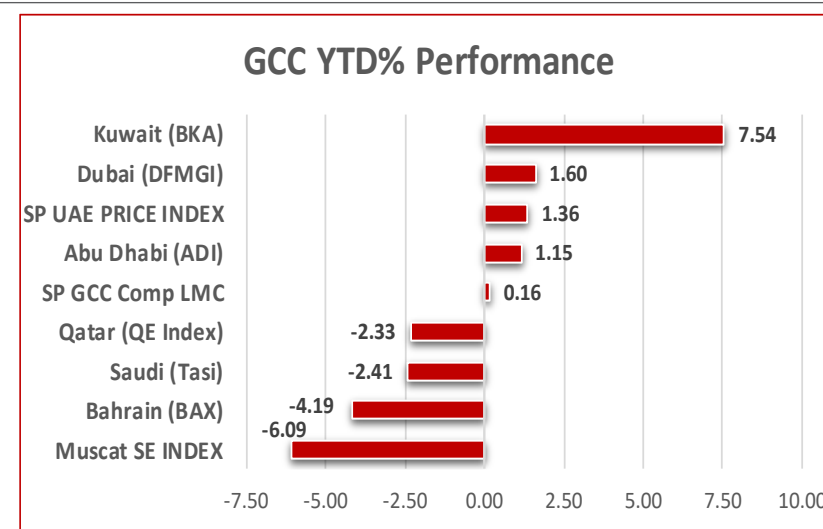
* GCC Markets performance at the latest close.

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 up today by 0.21%, the best performing sector today is health care at 3.23%.

KSA

Aramco closed at -0.39%, Sabic closed at -0.49%. STC closed at -1.25% and Al-Rajhi closed at -0.20%.

UAE

ETISALAT.AD closed at 0.81%, FAB.AD closed at 3.12%.



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