

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

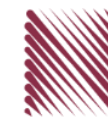
GCC DAILY MORNING BRIEF

Tuesday, 4th March 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

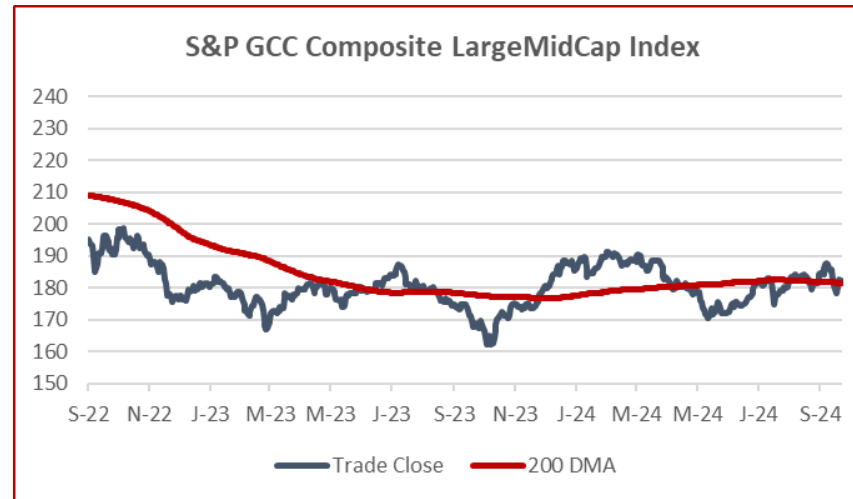


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,123.8	0.73	0.10	0.10	0.73	0.73	2.19	18.02	3.49	10,086.57
Qatar (QE Index)	10,464.1	0.18	0.18	0.18	-1.01	-1.01	1.18	11.34	4.73	528.50
Dubai (DFMGI)	5,327.6	0.19	0.19	0.19	3.27	3.27	1.72	10.24	5.30	795.90
Abu Dhabi (ADI)	9,560.3	-0.05	-0.05	-0.05	1.50	1.50	2.42	18.48	2.25	2,707.63
Bahrain (BAX)	1,980.2	0.47	1.02	1.02	-0.29	-0.29	0.88	8.92	4.98	7.53
Muscat SE INDEX	4,425.0	-0.36	-0.24	-0.24	-3.31	-3.31	0.78	9.28	6.18	7.13
SP GCC Comp LMC	192.9	0.69	0.56	0.56	2.67	2.67	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.7	0.20	0.20	0.20	2.93	2.93				

Developed Markets										
MSCI World Index	3,770.3	-0.92	-0.92	-0.92	1.69	1.69				
U.S. (S&P 500)	5,849.7	-1.76	-1.76	-1.76	-0.54	-0.54	4.57	26.26	1.56	52,172.47
U.K. (FTSE 100)	8,871.3	0.70	0.70	0.70	8.54	8.54	1.80	16.81	3.48	2,284.59
Japan (topix)	2,729.6	1.77	1.77	1.77	-1.99	-1.99	1.42	13.82	2.30	951,197.70
Emerging Markets										
MSCI EM Index	1,097.4	0.01	0.01	0.01	2.04	2.04				
China (SSE Composite)	3,316.9	-0.12	-0.12	-0.12	-1.04	-1.04	1.36	12.00		44,025.04
India (Sensex)	73,085.9	-0.15	-0.15	-0.15	-6.47	-6.47	3.95	20.60	1.23	142,813.33

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,173.2	0.40	0.89	0.89	11.01	11.01	1.68	15.85	3.41	49.23
Kuwait Premier Index	8,767.0	0.40	0.85	0.85	11.84	11.84	1.81	16.78	3.28	40.42
Kuwait Main Index	7,413.2	0.40	1.07	1.07	7.32	7.32	1.24	12.33	4.03	8.81
Kuwait Sector										
Banking	2,056.7	0.72	1.37	1.37	13.64	13.64	2.02	17.66	2.89	30.81
Telecom	1,050.9	-1.18	-1.68	-1.68	3.26	3.26	1.56	11.10	8.00	3.21
Industrials	760.7	-0.19	-0.28	-0.28	5.12	5.12	0.85	12.03	5.68	2.58
Financial Services	1,559.3	-0.29	-0.60	-0.60	3.23	3.23	1.27	13.14	2.68	5.21
Real Estate	1,576.5	-0.20	0.89	0.89	16.51	16.51	1.18	17.98	1.86	3.36
Basic Materials	921.6	-0.92	-1.10	-1.10	1.14	1.14	1.66	11.35	9.50	0.52
Health Care	529.9	1.20	2.05	2.05	15.63	15.63	1.77	17.91	1.98	
Consumer Staples	1,034.7	-1.27	-0.17	-0.17	3.60	3.60	2.25	21.09	1.99	0.31
Insurance	2,115.6	2.14	2.46	2.46	2.94	2.94	1.10	10.68	3.87	0.86
Consumer Discretionary	2,422.2	1.49	4.24	4.24	14.10	14.10				
Energy	1,355.3	-0.16	-0.68	-0.68	13.97	13.97	1.12	10.32	4.69	0.28
Technology	1,193.1	1.86	-26.13	-26.13	14.69	14.69	1.38			0.02
Utilities	418.4	2.58	2.58	2.58	5.30	5.30				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices continued to fall in on Tuesday after U.S. President Donald Trump paused military aid to Ukraine and as markets braced for U.S. tariffs on Canada, Mexico and China to take effect. Brent futures fell 54 cents, or 0.75%, to \$71.08 a barrel by 0149 GMT, while U.S. West Texas Intermediate (WTI) crude fell 36 cents, or 0.53%, to \$68.01.

Kuwait Market

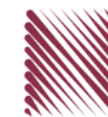
The market closed up by 0.40% at 8,173.2 value traded 147.0 million KD, Premier market value reached 55.0 million KD, closed up by 0.40% at 8,767.0

KSA Market

The market closed up by 0.73% at 12,123.8

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	1.045	0.48	1.46	1.46	16.63	16.63	1.91	15.05	3.35	8.68
KFH	0.810	0.62	1.12	1.12	8.58	8.58	2.27	17.46	2.72	13.83
ZAIN	0.479	-1.44	-2.44	-2.44	2.13	2.13	1.69	10.01	7.31	2.07
BOUBYAN BANK	0.680	0.74	1.49	1.49	21.21	21.21	2.69	31.47	1.47	2.85
AGILITY	0.272	0.00	-0.37	-0.37	10.12	10.12	0.71	11.35	7.35	0.73
Saudi Arabia										
ARAMCO	27.50	1.10	1.48	1.48	-1.96	-1.96	4.47	16.23	7.00	6,655.18
SABIC	62.60	1.29	0.97	0.97	-6.57	-6.57	1.13	76.01	5.43	187.81
STC	45.80	0.66	1.22	1.22	14.50	14.50	2.88	17.98	3.82	229.01
AL-RAJHI BANK	102.00	2.62	2.20	2.20	7.82	7.82	3.32	21.83	2.35	408.01
NCB	35.50	2.01	1.43	1.43	6.29	6.29	1.10	10.33	5.35	213.01
Abu Dhabi										
ETISALAT.AD	16.56	-0.72	-0.72	-0.72	1.47	1.47	3.16	13.39	4.92	144.71
FAB.AD	14.24	0.00	0.00	0.00	3.64	3.64	1.20	9.64	5.27	157.45
EMIRATES NBD	21.65	-2.04	-2.04	-2.04	0.93	0.93	1.09	6.08	4.62	137.70
DB ISLAMIC DB	7.60	-1.68	-1.68	-1.68	7.19	7.19	1.10	7.31	5.92	55.17
EMAR.DU	13.85	2.21	2.21	2.21	7.78	7.78	1.43	9.06	7.22	122.42
Qatar										
QNB	16.600	0.00	0.00	0.00	-3.99	-3.99	1.36	9.84	4.22	153.23
INDUSTREIS QAT	13.300	0.53	0.53	0.53	0.23	0.23	2.13	17.92	5.56	80.53
QA ISLAMIC BK	20.840	0.05	0.05	0.05	-2.43	-2.43	1.58	11.23	3.84	49.22
MASRAF AL RAYA	2.341	0.91	0.91	0.91	-4.95	-4.95	0.87	14.90	4.27	21.73
MESAIEED PETRO	1.427	-0.14	-0.14	-0.14	-4.55	-4.55	1.10	24.94	3.99	17.84
Oman										
BANK MUSCAT	0.257	-0.39	1.18	1.18	1.98	1.98	0.79	9.55	6.03	1.93
OMANTEL	0.815	-0.85	-0.85	-0.85	-13.30	-13.30	0.96	9.64	7.36	0.61
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	0.00	0.00	-5.41	-5.41	0.59	9.04	3.36	0.46
OMINVEST	0.335	0.30	0.30	0.30	1.52	1.52	0.71	7.61	5.97	0.22

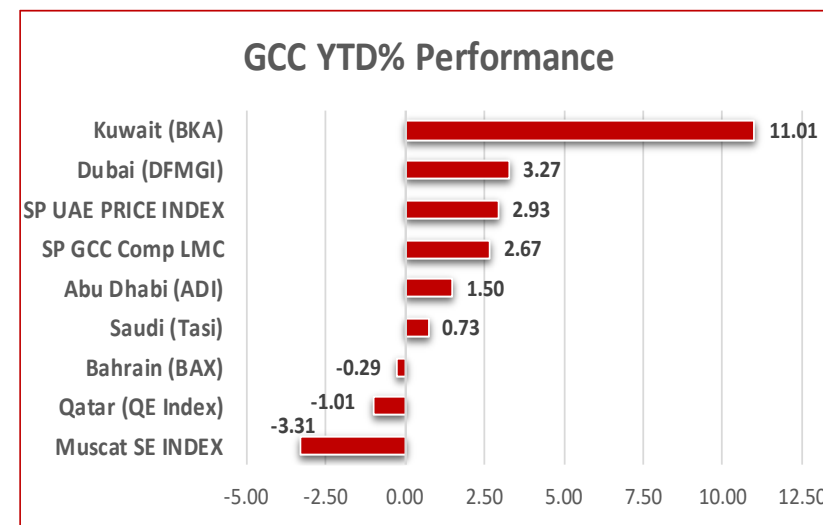
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
19-Feb. 25	25.23%	15.60%	0.06%	4.05%	9.25%	17.96%	13.46%	6.60%	6.78%
26-Feb. 25	25.36%	15.51%	0.06%	4.12%	9.26%	17.93%	13.51%	6.64%	6.95%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is up today by 0.40%, the best performing sector today is utilities at 2.58%.

KSA

Aramco closed today up by 1.10%, Sabic closed at 1.29%, STC closed at 0.66% and Al Rajhi closed at 2.62%.

UAE

ETISALAT.AD had a negative performance today at -0.72%, FAB.AD had a flat performance.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw