



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

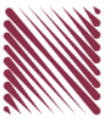
GCC DAILY MORNING BRIEF

Sunday, 4th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

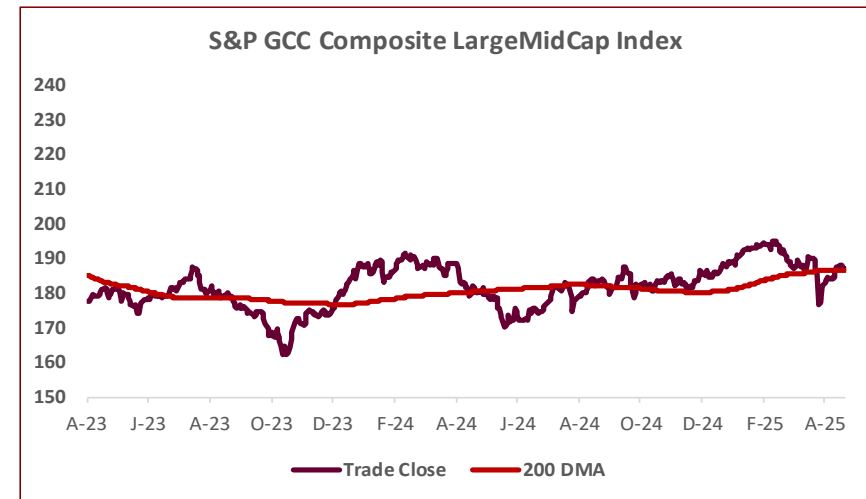


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,543.7	-1.10	-1.88	-1.10	-4.00	-4.09	2.10	15.84	3.76	9,435.96
Qatar (QE Index)	10,447.6	-0.12	1.83	-0.12	2.10	-1.17	1.19	11.43	4.73	527.09
Dubai (DFMGI)	5,291.4	0.35	2.49	-0.30	3.83	2.57	1.70	10.10	5.34	790.75
Abu Dhabi (ADI)	9,579.1	0.24	1.99	0.47	2.24	1.70	2.01	14.06	3.06	2,684.50
Bahrain (BAX)	1,912.2	0.50	0.56	-2.01	-2.01	-3.71	0.85	8.52	5.24	7.42
Muscat SE INDEX	4,329.6	0.31	1.31	0.31	-0.86	-5.40	0.77	8.99	6.59	7.01
SP GCC Comp LMC	187.3	0.15	-0.18	-0.47	-1.53	-0.32	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.8	0.59	2.93	0.73	3.40	2.34				

Developed Markets										
MSCI World Index	3,724.6	1.66	2.93	1.89	2.65	0.45				
U.S. (S&P 500)	5,686.7	1.47	2.92	2.11	1.33	-3.31	4.34	24.96	1.64	50,679.63
U.K. (FTSE 100)	8,596.4	1.17	2.15	1.19	0.16	5.18	1.80	16.37	3.55	2,236.11
Japan (topix)	2,687.8	0.31	2.27	0.77	1.09	-3.49	1.38	13.62	2.39	937,656.67
Emerging Markets										
MSCI EM Index	1,133.3	1.92	3.30	1.84	2.89	5.37				
China (SSE Composite)	3,279.0	-0.23	-0.49	-1.70	-1.70	-2.17	1.36	12.00		44,025.04
India (Sensex)	80,502.0	0.32	1.63	0.32	3.99	3.02	4.36	22.51	1.15	157,008.74

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,949.2	-0.13	0.21	-0.13	-1.55	7.97	1.63	15.01	3.57	48.29
Kuwait Premier Index	8,561.9	0.10	0.93	0.10	-1.30	9.23	1.79	16.45	3.43	39.91
Kuwait Main Index	7,067.6	-1.22	-3.14	-1.22	-2.75	2.32	1.13	10.26	4.23	8.38
Kuwait Sector										
Banking	2,001.7	-0.15	0.75	-0.15	-2.08	10.60	1.92	16.16	3.06	30.40
Telecom	1,030.2	0.01	-2.05	0.01	-1.88	1.22	1.55	10.63	7.36	3.15
Industrials	744.5	-1.07	-2.47	-1.07	-0.08	2.88	1.11	13.94	5.94	2.52
Financial Services	1,479.1	-0.01	-1.04	-0.01	-1.94	-2.09	1.15	12.71	3.30	4.94
Real Estate	1,604.1	0.83	3.89	0.83	5.74	18.55	1.12	18.21	1.88	3.41
Basic Materials	917.2	0.73	-0.14	0.73	2.03	0.65	1.63	11.23	9.94	0.52
Health Care	580.6	0.00	3.23	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,002.8	-4.47	0.86	-4.47	1.59	0.41	2.10	19.36	2.56	0.30
Insurance	1,799.2	-0.61	-7.60	-0.61	-15.62	-12.46	0.92	8.74	3.59	0.73
Consumer Discretionary	2,316.6	-0.15	-1.46	-0.15	-1.86	9.13				
Energy	1,384.5	-0.11	1.75	-0.11	4.49	16.43	1.12	9.76	5.27	0.28
Technology	1,134.9	0.65	-4.29	0.65	5.41	9.09	1.32			0.02
Utilities	389.5	0.00	0.00	0.00	-3.90	-1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell over 1% lower on Friday and recorded for their biggest weekly losses since the end of March, as traders turned cautious ahead of an OPEC+ meeting to decide the group's output policy for June. Brent crude futures closed down 84 cents, or 1.4%, at \$61.29 a barrel.

Kuwait Market

The market closed down by -0.13% at 7,949.2 value traded 82.6 million KD, Premier market value reached 43.7 million KD, closed up by 0.10% at 8,561.9.

KSA Market

The market closed down by -1.1% at 11,543.7.

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	0.955	0.32	2.80	0.32	-4.32	11.91	1.87	14.76	3.49	8.35
KFH	0.725	0.28	0.83	0.28	-1.51	4.96	2.08	16.77	2.81	13.40
ZAIN	0.472	-0.21	-4.84	-0.21	-1.67	0.64	1.66	9.87	7.42	2.04
BOUBYAN BANK	0.680	0.15	1.04	0.15	4.08	27.27	2.88	32.91	1.40	3.00
AGILITY	0.262	-0.38	1.16	-0.38	3.97	6.07	0.66	10.52	7.63	0.70
Saudi Arabia										
ARAMCO	25.20	-0.59	-2.33	-0.59	-5.79	-10.16	4.18	15.48	7.05	6,098.40
SABIC	61.30	0.49	-1.13	0.49	-3.77	-8.51	1.17	87.74	5.55	183.90
STC	47.00	-1.26	-2.08	-1.26	3.64	17.50	2.62	21.88	4.04	235.00
AL-RAJHI BANK	96.50	-0.92	-1.73	-0.92	-5.39	2.01	3.14	20.66	2.81	386.00
NCB	34.90	-2.24	-2.51	-2.24	-2.65	4.49	1.07	9.75	5.44	209.40
Abu Dhabi										
ETISALAT.AD	17.44	-0.11	1.28	0.11	3.08	6.74	2.97	11.00	4.76	151.50
FAB.AD	15.10	0.66	9.35	1.20	9.99	10.63	1.32	9.69	4.93	167.92
EMIRATES NBD	20.70	0.73	2.73	0.73	2.48	-3.50	1.03	5.95	4.83	130.75
DB ISLAMIC DB	7.55	-1.05	1.34	-0.13	5.30	6.49	1.20	7.13	5.96	54.67
EMAR.DU	13.40	1.52	3.47	2.29	0.37	4.28	1.39	8.76	7.46	118.44
Qatar										
QNB	16.660	-0.24	2.84	-0.24	3.48	-3.64	1.35	9.79	4.20	153.88
INDUSTREIS QAT	12.200	-2.87	0.41	-2.87	-5.35	-8.06	1.96	16.44	6.07	73.81
QA ISLAMIC BK	21.250	0.66	3.66	0.66	3.31	-0.51	1.63	11.35	3.76	50.21
MASRAF AL RAYA	2.233	0.04	2.15	0.04	-0.76	-9.34	0.84	14.20	4.48	20.77
MESAIEED PETRO	1.388	-1.56	-0.36	-1.56	-3.48	-7.16	1.08	24.53	4.11	17.44
Oman										
BANK MUSCAT	0.259	1.57	3.19	1.57	2.37	2.78	0.82	9.43	6.37	1.94
OMANTEL	0.816	-0.24	0.25	-0.24	-4.00	-13.19	0.92	7.93	6.74	0.61
BANK DHOFAR	0.148	-0.67	0.00	-0.67	3.55	-3.75	0.62	12.98	4.36	0.45
NAT BANK OF OMAN	0.295	0.00	1.03	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.215	-0.92	-2.27	-0.92	-11.47	-8.79	0.62	7.40	6.64	0.20

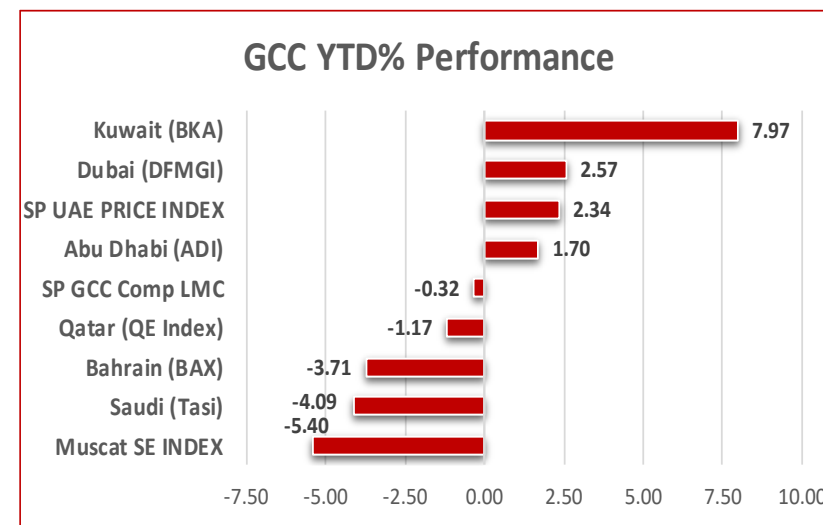
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
23-April. 25	26.16%	14.55%	0.06%	5.85%	9.19%	18.08%	13.65%	6.90%	7.84%
30-April. 25	26.30%	14.59%	0.06%	5.86%	8.98%	18.09%	13.71%	6.89%	7.96%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



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Kuwait

The market is up today down -0.13%, the worst performing sector today is consumer staples at -4.47%.

KSA

Aramco closed at -0.59%, Sabic closed at 0.49%. STC closed at -1.26% and Al-Rajhi closed at -0.92%.

UAE

ETISALAT.AD closed at -0.11%, FAB.AD closed at 0.66%.



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