



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, 5th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

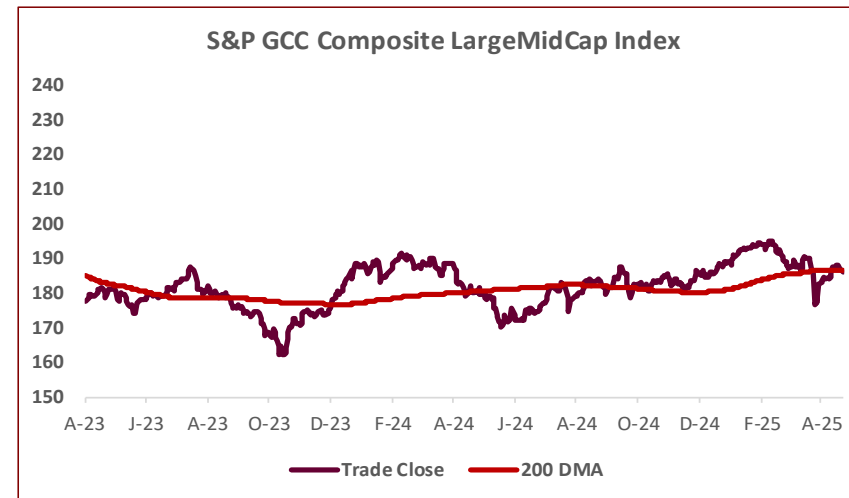


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,411.5	-1.14	-1.14	-2.23	-5.10	-5.19	2.07	15.67	3.80	9,327.94
Qatar (QE Index)	10,499.6	0.50	0.50	0.38	2.61	-0.68	1.19	11.46	4.70	529.11
Dubai (DFMGI)	5,291.4	0.35	2.49	-0.30	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)	1,912.1	-0.01	-0.01	-0.01	-2.01	-3.72	0.85	8.50	5.24	7.42
Muscat SE INDEX	4,342.4	0.30	0.30	0.61	-0.56	-5.12	0.77	9.04	6.56	7.04
SP GCC Comp LMC	186.2	-0.60	-0.60	-1.07	-2.12	-0.92	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.8	0.00	0.00	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	7,966.5	0.22	0.22	0.09	-1.33	8.20	1.63	15.01	3.57	48.29
Kuwait Premier Index	8,595.6	0.39	0.39	0.49	-0.91	9.65	1.79	16.45	3.43	39.91
Kuwait Main Index	7,023.0	-0.63	-0.63	-1.84	-3.37	1.68	1.13	10.26	4.23	8.38
Kuwait Sector										
Banking	2,005.4	0.19	0.19	0.04	-1.89	10.81	1.92	16.16	3.06	30.40
Telecom	1,021.3	-0.86	-0.86	-0.85	-2.72	0.35	1.55	10.63	7.36	3.15
Industrials	749.6	0.69	0.69	-0.39	0.61	3.58	1.11	13.94	5.94	2.52
Financial Services	1,485.1	0.41	0.41	0.39	-1.54	-1.69	1.15	12.71	3.30	4.94
Real Estate	1,603.6	-0.03	-0.03	0.79	5.70	18.51	1.12	18.21	1.88	3.41
Basic Materials	913.9	-0.36	-0.36	0.36	1.67	0.29	1.63	11.23	9.94	0.52
Health Care	580.6	0.00	0.00	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,075.7	7.28	7.28	2.48	8.99	7.71	2.10	19.36	2.56	0.30
Insurance	1,795.2	-0.22	-0.22	-0.83	-15.80	-12.65	0.92	8.74	3.59	0.73
Consumer Discretionary	2,339.8	1.00	1.00	0.85	-0.88	10.22				
Energy	1,409.2	1.79	1.79	1.67	6.36	18.51	1.12	9.76	5.27	0.28
Technology	1,156.7	1.92	1.92	2.58	7.43	11.19	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

U.S. crude oil futures fell more than 4% on Sunday, after OPEC+ agreed to surge production for a second month. U.S. crude was down \$2.49, or 4.27%, to \$55.80 a barrel shortly after trading opened. Global benchmark Brent fell \$2.39, or 3.9%, to \$58.90 per barrel. Oil prices have fallen more than 20% this year.

Kuwait Market

The market closed up by 0.22% at 7,966.5 value traded 66.5 million KD, Premier market value reached 38.8 million KD, closed up by 0.39% at 8,595.6.

KSA Market

The market closed down by -1.14% at 11,411.5.

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	0.959	0.42	0.42	0.74	-3.92	12.38	1.88	14.82	3.48	8.39
KFH	0.728	0.41	0.41	0.69	-1.10	5.39	2.09	16.84	2.80	13.46
ZAIN	0.469	-0.64	-0.64	-0.85	-2.29	0.00	1.65	9.80	7.46	2.03
BOUBYAN BANK	0.678	-0.29	-0.29	-0.15	3.78	26.90	2.87	32.82	1.40	2.99
AGILITY	0.267	1.91	1.91	1.52	5.95	8.10	0.67	10.72	7.49	0.71
Saudi Arabia										
ARAMCO	24.94	-1.03	-1.03	-1.62	-6.77	-11.09	4.14	15.32	7.12	6,036.12
SABIC	59.60	-2.77	-2.77	-2.30	-6.44	-11.04	1.14	85.31	5.70	178.82
STC	45.90	-2.34	-2.34	-3.57	1.21	14.75	2.51	20.26	4.14	229.52
AL-RAJHI BANK	96.50	0.00	0.00	-0.92	-5.39	2.01	2.88	19.17	2.81	386.04
NCB	34.40	-1.43	-1.43	-3.64	-4.04	2.99	1.06	9.61	5.52	206.42
Abu Dhabi										
ETISALAT.AD	17.42	-0.11	1.28	0.11	3.08	6.74	2.97	11.00	4.76	151.50
FAB.AD	15.20	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	16.720	0.36	0.36	0.12	3.85	-3.30	1.36	9.82	4.19	154.89
INDUSTREIS QAT	12.170	-0.25	-0.25	-3.11	-5.59	-8.29	2.04	17.52	6.08	73.85
QA ISLAMIC BK	21.700	2.12	2.12	2.79	5.49	1.59	1.66	11.59	3.69	51.43
MASRAF AL RAYA	2.262	1.30	1.30	1.34	0.53	-8.16	0.86	14.38	4.42	21.10
MESAIEED PETRO	1.387	-0.07	-0.07	-1.63	-3.55	-7.22	1.08	24.51	4.11	17.48
Oman										
BANK MUSCAT	0.262	1.16	1.16	2.75	3.56	3.97	0.83	9.53	6.30	1.97
OMANTEL	0.816	0.00	0.00	-0.24	-4.00	-13.19	0.92	7.93	6.74	0.61
BANK DHOFAR	0.148	0.00	0.00	-0.67	3.55	-3.75	0.62	12.98	4.36	0.45
NAT BANK OF OMAN	0.295	0.00	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.221	2.79	2.79	1.84	-9.00	-6.24	0.64	7.61	6.46	0.21

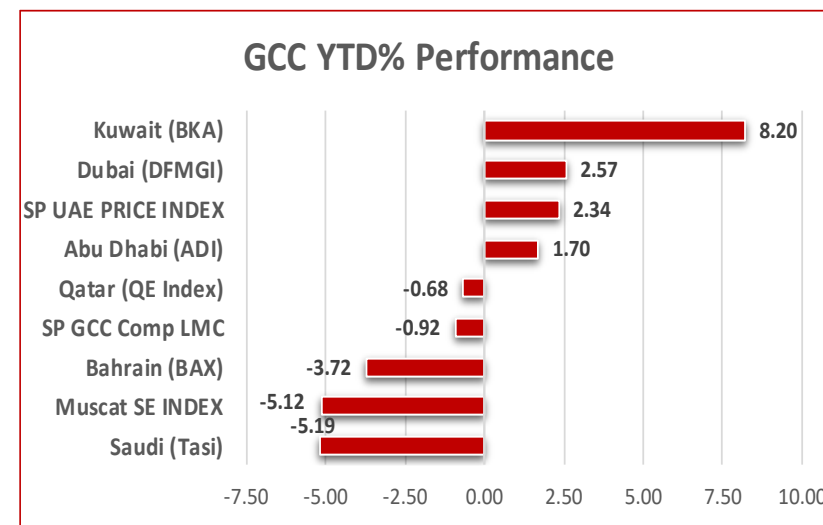
* GCC Markets performance at the latest close.

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



* GCC Markets performance at the latest close.

Kuwait

The market is up today up 0.22%, the best performing sector today is consumer staples at 7.28%.

KSA

Aramco closed at -1.03%, Sabic closed at -2.77%. STC closed at -2.34% and Al-Rajhi closed at 0%,

UAE

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



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