

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 6th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

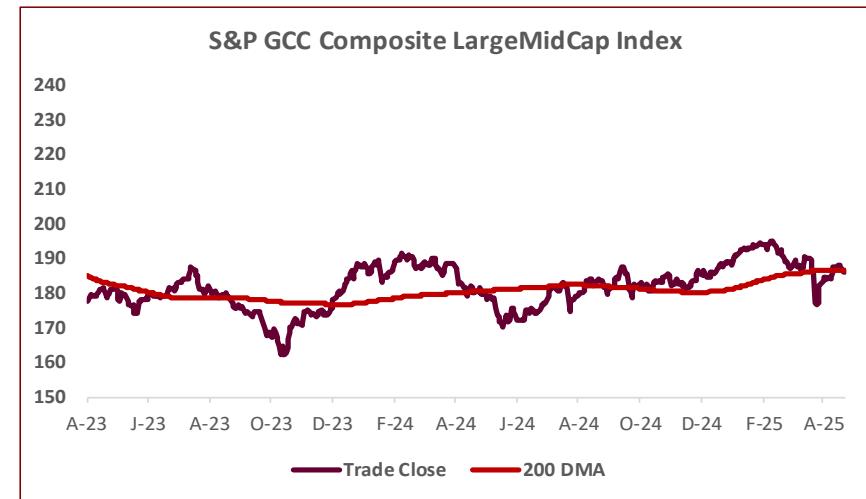


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,423.0	0.10	-1.05	-2.13	-5.01	-5.10	2.08	15.68	3.81	9,330.18
Qatar (QE Index)	10,455.7	-0.42	0.08	-0.04	2.18	-1.09	1.19	11.41	4.72	527.29
Dubai (DFMGI)	5,344.7	1.01	1.01	0.71	4.87	3.61	1.72	10.16	5.30	798.20
Abu Dhabi (ADI)	9,565.9	-0.14	-0.14	0.33	2.10	1.56	2.01	14.18	3.06	2,682.57
Bahrain (BAX)	1,907.0	-0.27	-0.27	-0.27	-2.28	-3.98	0.85	8.47	5.26	7.40
Muscat SE INDEX	4,339.2	-0.07	0.22	0.53	-0.64	-5.19	0.77	9.02	6.57	7.03
SP GCC Comp LMC	186.3	0.06	-0.54	-1.01	-2.06	-0.86	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.4	0.36	0.36	1.09	3.77	2.72				

Developed Markets										
MSCI World Index	3,707.4	-0.46	-0.46	1.42	2.17	-0.01				
U.S. (S&P 500)	5,650.4	-0.64	-0.64	1.46	0.69	-3.93	4.34	24.92	1.64	50,672.52
U.K. (FTSE 100)	8,596.4	0.00	0.00	1.19	0.16	5.18	1.81	16.37	3.55	2,236.08
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	1,139.6	0.56	0.56	2.40	3.47	5.96				
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)	80,796.8	0.37	0.37	0.69	4.37	3.40	4.38	22.65	1.16	157,738.81

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,974.6	0.10	0.32	0.19	-1.23	8.31	1.63	15.03	3.55	48.39
Kuwait Premier Index	8,611.5	0.18	0.58	0.68	-0.73	9.86	1.80	16.49	3.41	40.06
Kuwait Main Index	7,001.2	-0.31	-0.94	-2.15	-3.67	1.36	1.12	10.18	4.26	8.33
Kuwait Sector										
Banking	2,008.3	0.14	0.33	0.18	-1.75	10.97	1.93	16.19	3.06	30.46
Telecom	1,031.3	0.98	0.11	0.11	-1.77	1.33	1.53	10.54	7.43	3.12
Industrials	748.8	-0.10	0.58	-0.49	0.50	3.48	1.11	14.05	5.90	2.54
Financial Services	1,480.4	-0.32	0.09	0.08	-1.85	-2.00	1.15	12.64	3.29	4.96
Real Estate	1,599.4	-0.26	-0.29	0.53	5.43	18.20	1.12	18.20	1.83	3.41
Basic Materials	911.4	-0.27	-0.63	0.09	1.40	0.02	1.62	11.19	9.98	0.52
Health Care	580.6	0.00	0.00	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,090.8	1.40	8.78	3.92	10.51	9.22	2.25	20.83	2.39	0.33
Insurance	1,800.3	0.28	0.06	-0.55	-15.57	-12.41	0.91	8.72	3.52	0.73
Consumer Discretionary	2,337.5	-0.10	0.90	0.76	-0.98	10.11				
Energy	1,395.1	-1.00	0.77	0.65	5.30	17.32	1.14	9.94	5.18	0.29
Technology	1,149.5	-0.63	1.28	1.94	6.76	10.49	1.35			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 steadied on Tuesday after hitting four-year lows in the previous session that was driven by an OPEC+ decision to accelerate output increases, stoking fears of oversupply at a time when U.S. tariffs have spurred concerns about demand. Brent crude futures rose 10 cents to \$60.33 a barrel by 0050 GMT, while U.S. West Texas Intermediate crude added 10 cents to \$57.23 a barrel.

Kuwait Market

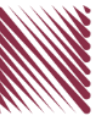
The market closed up by 0.10% at 7,974.6 value traded 79.6 million KD, Premier market value reached 52.0 million KD, closed up by 0.18% at 8,611.5.

KSA Market

The market closed up by 0.10% at 11,423.0.

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	0.00	0.42	0.74	-3.92	12.38	1.88	14.82	3.48	8.38
KFH	0.729	0.14	0.55	0.83	-0.97	5.54	2.09	16.86	2.79	13.46
ZAIN	0.475	1.28	0.64	0.42	-1.04	1.28	1.67	9.93	7.37	2.05
BOUBYAN BANK	0.682	0.59	0.29	0.44	4.39	27.65	2.88	33.01	1.40	3.01
AGILITY	0.264	-1.12	0.76	0.38	4.76	6.88	0.66	10.60	3.79	0.71
Saudi Arabia										
ARAMCO	24.90	-0.16	-1.19	-1.78	-6.92	-11.23	4.13	15.29	7.13	6,026.44
SABIC	60.10	0.84	-1.96	-1.48	-5.65	-10.30	1.15	86.02	5.66	180.32
STC	46.20	0.65	-1.70	-2.94	1.87	15.50	2.53	20.40	4.11	231.02
AL-RAJHI BANK	95.60	-0.93	-0.93	-1.85	-6.27	1.06	2.85	18.99	2.83	382.44
NCB	34.65	0.73	-0.72	-2.94	-3.35	3.74	1.06	9.68	5.48	207.92
Abu Dhabi										
ETISALAT.AD	17.46	0.23	0.23	0.34	3.31	6.99	2.98	11.02	4.75	151.85
FAB.AD	15.20	0.00	0.00	1.20	9.99	10.63	1.32	9.69	4.93	167.92
EMIRATES NBD	21.35	3.14	3.14	3.89	5.69	-0.47	1.07	6.14	4.68	134.86
DB ISLAMIC DB	7.56	0.13	0.13	0.00	5.44	6.63	1.20	7.14	5.95	54.74
EMAR.DU	13.45	0.37	0.37	2.67	0.75	4.67	1.39	8.80	7.43	118.88
Qatar										
QNB	16.720	0.00	0.36	0.12	3.85	-3.30	1.36	9.82	4.19	153.98
INDUSTREIS QAT	12.050	-0.99	-1.23	-4.06	-6.52	-9.19	2.02	17.35	6.14	72.69
QA ISLAMIC BK	21.500	-0.92	1.18	1.85	4.52	0.66	1.65	11.48	3.72	50.66
MASRAF AL RAYA	2.245	-0.75	0.54	0.58	-0.22	-8.85	0.85	14.28	4.45	20.82
MESAIEED PETRO	1.379	-0.58	-0.65	-2.20	-4.10	-7.76	1.07	24.37	4.13	17.27
Oman										
BANK MUSCAT	0.262	0.00	1.16	2.75	3.56	3.97	0.83	9.53	6.30	1.97
OMANTEL	0.817	0.12	0.12	-0.12	-3.88	-13.09	0.92	7.94	6.73	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	0.218	-1.36	1.40	0.46	-10.24	-7.52	0.63	7.50	6.55	0.20

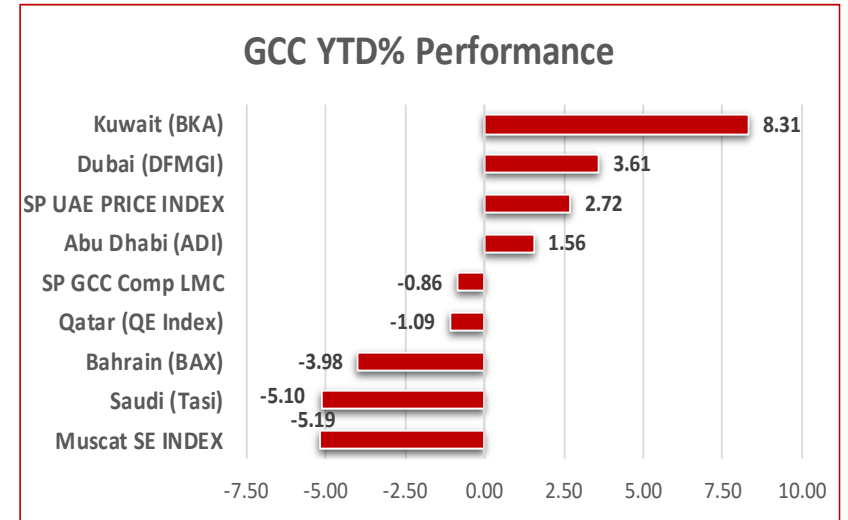
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
23-April. 25	26.16%	14.55%	0.06%	5.85%	9.19%	18.08%	13.65%	6.90%	7.84%
30-April. 25	26.30%	14.59%	0.06%	5.86%	8.98%	18.09%	13.71%	6.89%	7.96%

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 0.10%, the best performing sector today is consumer staples at 1.40%.

KSA

Aramco closed at -0.16%, Sabic closed at 0.84%. STC closed at 0.65% and Al-Rajhi closed at -0.93%.

UAE

ETISALAT.AD closed at 0.23%, FAB.AD closed at 0%.



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