



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

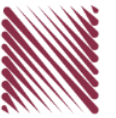
GCC DAILY MORNING BRIEF

Monday, 7th April 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



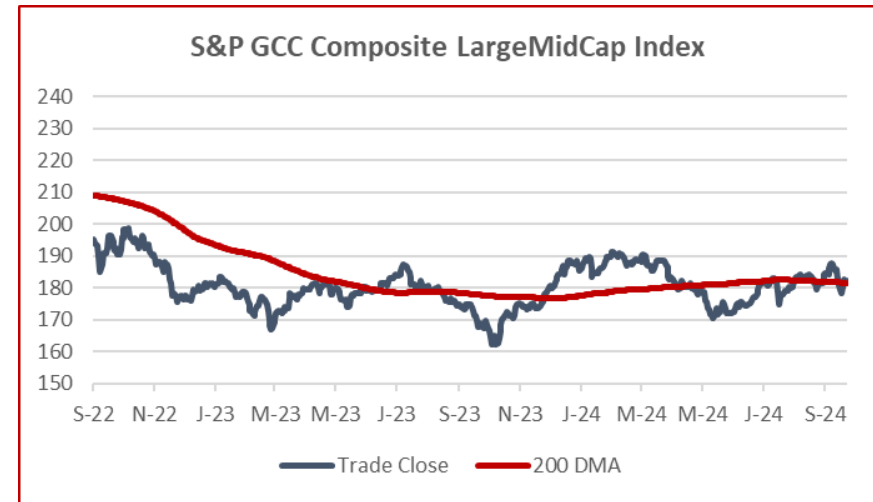
* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,077.2	-6.78	-6.78	-7.88	-7.88	-7.97	2.00	15.47	3.88	9,196.24
Qatar (QE Index)	9,800.0	-4.23	-4.23	-4.23	-4.23	-7.29	1.11	10.67	5.05	492.95
Dubai (DFMGI)	4,951.5	-1.51	-2.84	-2.84	-2.84	-4.02	1.59	9.41	5.72	730.99
Abu Dhabi (ADI)	9,187.0	-0.76	-1.94	-1.94	-1.94	-2.46	1.90	14.35	3.23	2,586.73
Bahrain (BAX)	1,919.1	-1.00	-1.00	-1.65	-1.65	-3.36	0.85	8.68	5.14	7.29
Muscat SE INDEX	4,252.7	-2.62	-2.62	-2.62	-2.62	-7.08	0.75	8.79	6.76	6.84
SP GCC Comp LMC	177.2	-4.97	-4.97	-6.84	-6.84	-5.70	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	142.6	0.00	0.00	-5.34	-5.34	-6.31				

Developed Markets										
MSCI World Index	3,326.3	-5.84	-8.49	-8.33	-8.33	-10.29				
U.S. (S&P 500)	5,074.1	-5.97	-9.08	-9.58	-9.58	-13.73	3.94	22.74	1.81	45,264.90
U.K. (FTSE 100)	8,055.0	-4.95	-6.97	-6.15	-6.15	-1.44	1.68	15.41	3.80	2,097.58
Japan (topix)	2,482.1	-3.37	-9.98	-6.64	-6.64	-10.87	1.29	12.60	2.53	864,755.34

Emerging Markets										
MSCI EM Index	1,087.6	-1.38	-2.96	-1.25	-1.25	1.13				
China (SSE Composite)	3,342.0	-0.24	-0.28	0.19	0.19	-0.29	1.36	12.00		44,025.04
India (Sensex)	75,364.7	-1.22	-2.65	-2.65	-2.65	-3.55	4.09	21.24	1.19	146,987.73

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,587.9	-5.16	-5.16	-6.02	-6.02	3.06	1.66	15.08	3.49	48.17
Kuwait Premier Index	8,106.1	-5.69	-5.69	-6.56	-6.56	3.41	1.82	16.42	3.35	39.62
Kuwait Main Index	7,013.2	-2.67	-2.67	-3.50	-3.50	1.53	1.16	10.56	4.21	8.55
Kuwait Sector										
Banking	1,913.9	-5.61	-5.61	-6.37	-6.37	5.75	1.98	16.31	3.02	30.37
Telecom	1,010.8	-2.75	-2.75	-3.72	-3.72	-0.68	1.56	10.98	7.30	3.18
Industrials	700.6	-3.88	-3.88	-5.97	-5.97	-3.18	1.08	12.88	5.88	2.47
Financial Services	1,399.9	-6.16	-6.16	-7.19	-7.19	-7.33	1.18	12.95	2.99	4.98
Real Estate	1,436.2	-5.11	-5.11	-5.33	-5.33	6.14	1.07	17.28	1.91	3.21
Basic Materials	877.8	-3.64	-3.64	-2.35	-2.35	-3.67	1.62	11.15	9.62	0.51
Health Care	570.6	0.00	0.00	0.00	0.00	24.50	1.96	22.49	1.84	
Consumer Staples	944.5	3.37	3.37	-4.30	-4.30	-5.42	1.91	17.48	2.81	0.28
Insurance	2,092.5	0.34	0.34	-1.86	-1.86	1.81	1.06	10.18	3.51	0.84
Consumer Discretionary	2,188.6	-6.75	-6.75	-7.29	-7.29	3.10				
Energy	1,302.4	-2.40	-2.40	-1.70	-1.70	9.52	1.08	9.47	5.47	0.27
Technology	1,084.0	-5.70	-5.70	0.68	0.68	4.20	1.34			0.02
Utilities	379.0	-4.64	-4.64	-6.49	-6.49	-4.64				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices slid more than 3% on Monday, deepening last week's losses, as escalating trade tensions between the United States and China stoked fears of a recession that would reduce demand for crude. Brent futures declined \$2.28, or 3.5%, to \$63.30 a barrel at 0049 GMT, while U.S. West Texas Intermediate crude futures lost \$2.20, or 3.6%, to \$59.79. At the session low, both benchmarks hit their lowest since April 2021.

Kuwait Market

The market closed down by -5.16% at 7,587.9 value traded 96.5 million KD, Premier market value reached 81.1 million KD, closed down by -5.69% at 8,106.1.

KSA Market

The market closed down by -6.78% at 11,077.2

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	0.974	-6.97	-6.97	-7.06	-7.06	8.71	1.78	14.03	3.47	8.12
KFH	0.745	-5.46	-5.46	-6.29	-6.29	-0.13	2.09	16.06	2.95	12.75
ZAIN	0.457	-3.38	-3.38	-4.79	-4.79	-2.56	1.61	9.55	7.66	1.98
BOUBYAN BANK	0.634	-6.07	-6.07	-7.58	-7.58	13.01	2.50	29.34	1.58	2.67
AGILITY	0.229	-7.29	-7.29	-9.13	-9.13	-7.29	0.57	9.20	8.73	0.61
Saudi Arabia										
ARAMCO	24.92	-5.25	-5.25	-6.84	-6.84	-11.16	4.13	15.30	7.13	6,028.87
SABIC	60.50	-3.82	-3.82	-5.02	-5.02	-9.70	1.16	86.60	5.62	181.45
STC	43.95	-4.46	-4.46	-3.09	-3.09	9.88	2.45	20.46	3.98	219.69
AL-RAJHI BANK	94.70	-5.86	-5.86	-7.16	-7.16	0.11	3.08	20.27	2.86	378.69
NCB	32.80	-6.82	-6.82	-8.51	-8.51	-1.80	1.01	9.54	5.79	196.74
Abu Dhabi										
ETISALAT.AD	16.78	1.70	-0.71	-0.71	-0.71	2.82	3.20	13.57	4.95	145.93
FAB.AD	12.70	-2.91	-8.10	-8.10	-8.10	-7.57	1.07	8.60	5.91	140.22
EMIRATES NBD	19.15	-2.79	-5.20	-5.20	-5.20	-10.72	0.96	5.38	5.22	120.96
DB ISLAMIC DB	7.20	0.28	0.42	0.42	0.42	1.55	1.04	6.93	6.25	52.13
EMAR.DU	11.85	-2.47	-11.24	-11.24	-11.24	-7.78	1.23	7.75	8.44	104.74
Qatar										
QNB	15.460	-3.98	-3.98	-3.98	-3.98	-10.58	1.26	9.17	4.53	143.06
INDUSTREIS QAT	11.830	-8.22	-8.22	-8.22	-8.22	-10.85	1.90	15.94	6.26	71.71
QA ISLAMIC BK	19.740	-4.04	-4.04	-4.04	-4.04	-7.58	1.50	10.63	4.05	46.73
MASRAF AL RAYA	2.157	-4.13	-4.13	-4.13	-4.13	-12.42	0.80	13.73	4.64	20.10
MESAIEED PETRO	1.345	-6.47	-6.47	-6.47	-6.47	-10.03	1.03	23.51	4.24	16.93
Oman										
BANK MUSCAT	0.248	-1.98	-1.98	-1.98	-1.98	-1.59	0.76	9.22	6.65	1.86
OMANTEL	0.808	-4.94	-4.94	-4.94	-4.94	-14.04	0.91	7.85	6.81	0.61
BANK DHOFAR	0.143	0.00	0.00	0.00	0.00	-7.05	0.58	13.05	4.52	0.43
NAT BANK OF OMAN	0.290	0.00	0.00	0.00	0.00	-2.03	0.61	9.37	3.24	0.47
OMINVEST	0.220	-9.41	-9.41	-9.41	-9.41	-6.67	0.64	7.57	6.49	0.21

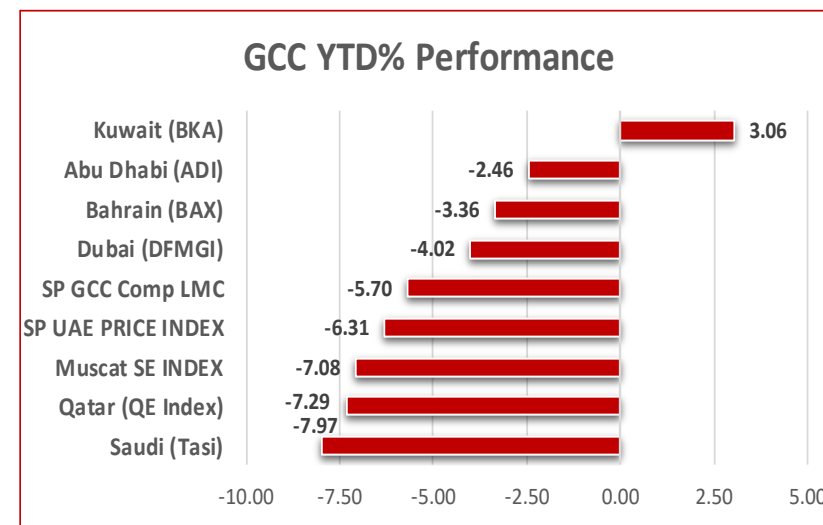
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
26-Mar. 25	25.80%	15.52%	0.06%	4.96%	9.47%	18.12%	13.62%	6.82%	7.21%
02-April. 25	25.97%	15.64%	0.06%	5.62%	9.48%	18.11%	13.65%	6.87%	7.30%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -5.16%, the best worst sector today is consumer discretionary at -6.75%.

KSA

Aramco closed at -5.25%, Sabic closed at -3.82%, STC closed at -4.46% and Al-Rajhi closed at -94.7%.

UAE

ETISALAT.AD had closed today at 1.70%, FAB.AD closed at -2.91%.



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