

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

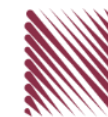
GCC DAILY MORNING BRIEF

Wednesday, 7th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

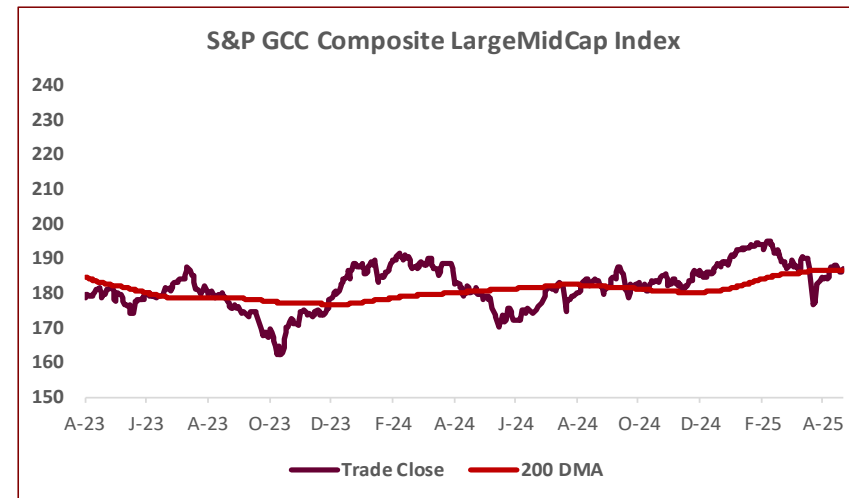


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,434.1	0.10	-0.95	-2.03	-4.91	-5.00	2.08	15.70	3.80	9,349.41
Qatar (QE Index)	10,484.5	0.28	0.35	0.23	2.46	-0.82	1.19	11.46	4.70	529.45
Dubai (DFMGI)	5,353.0	0.16	1.16	0.86	5.04	3.77	1.73	10.21	5.27	801.46
Abu Dhabi (ADI)	9,623.4	0.60	0.46	0.93	2.72	2.17	2.02	14.28	3.04	2,697.45
Bahrain (BAX)	1,908.7	0.09	-0.18	-0.18	-2.19	-3.89	0.85	8.47	5.26	7.40
Muscat SE INDEX	4,342.1	0.07	0.29	0.60	-0.57	-5.12	0.77	9.03	6.56	7.04
SP GCC Comp LMC	187.0	0.41	-0.13	-0.60	-1.65	-0.45	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.9	0.94	1.31	2.05	4.75	3.69				

Developed Markets										
MSCI World Index	3,687.2	-0.55	-1.01	0.87	1.61	-0.56				
U.S. (S&P 500)	5,606.9	-0.77	-1.40	0.68	-0.09	-4.67	4.31	24.87	1.65	50,371.34
U.K. (FTSE 100)	8,597.4	0.01	0.01	1.21	0.17	5.19	1.81	16.37	3.55	2,236.30
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	1,137.4	-0.19	0.37	2.21	3.27	5.76				
China (SSE Composite)	3,316.1	1.13	1.13	1.13	-0.59	-1.06	1.36	12.00		44,025.04
India (Sensex)	80,641.1	-0.19	0.17	0.50	4.17	3.20	4.37	22.58	1.16	157,448.64

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,990.4	0.20	0.52	0.39	-1.04	8.53	1.63	15.04	3.49	48.44
Kuwait Premier Index	8,635.0	0.27	0.85	0.95	-0.46	10.16	1.80	16.52	3.34	40.14
Kuwait Main Index	6,989.2	-0.17	-1.11	-2.32	-3.83	1.19	1.12	10.14	4.25	8.30
Kuwait Sector										
Banking	2,009.1	0.04	0.37	0.22	-1.71	11.01	1.93	16.20	3.05	30.50
Telecom	1,032.7	0.14	0.25	0.25	-1.64	1.47	1.55	10.64	7.35	3.15
Industrials	757.0	1.10	1.69	0.60	1.61	4.61	1.11	14.03	4.88	2.54
Financial Services	1,484.9	0.30	0.39	0.38	-1.56	-1.70	1.15	12.58	3.29	4.94
Real Estate	1,601.9	0.16	-0.14	0.69	5.59	18.39	1.12	18.15	1.84	3.40
Basic Materials	919.4	0.87	0.24	0.97	2.28	0.89	1.62	11.16	10.00	0.51
Health Care	580.6	0.00	0.00	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,092.8	0.19	8.98	4.11	10.72	9.43	2.28	21.17	2.35	0.33
Insurance	1,800.5	0.01	0.07	-0.53	-15.55	-12.39	0.92	8.75	3.51	0.73
Consumer Discretionary	2,378.5	1.75	2.67	2.52	0.76	12.04				
Energy	1,389.9	-0.38	0.39	0.27	4.90	16.88	1.13	9.84	5.23	0.28
Technology	1,113.1	-3.16	-1.92	-1.29	3.38	6.99	1.34			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 rose on Wednesday on signs of weakening production in the U.S. and higher demand in Europe and China as buyers emerged after prices fell to new lows earlier in the week. Brent crude futures gained 37 cents a barrel, or 0.6%, to \$62.52 a barrel by 1215 GMT, while U.S. West Texas Intermediate crude was at \$59.53 a barrel, up 44 cents, or 0.74%.

Kuwait Market

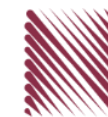
The market closed up by 0.20% at 7,990.4 value traded 94.7 million KD, Premier market value reached 55.1 million KD, closed up by 0.27% at 8,635.0.

KSA Market

The market closed up by 0.10% at 11,434.1.

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	-0.42	0.00	0.32	-4.32	11.91	1.87	14.76	3.49	8.34
KFH	0.735	0.82	1.38	1.66	-0.15	6.41	2.11	17.00	2.77	13.57
ZAIN	0.476	0.21	0.85	0.63	-0.83	1.49	1.68	9.95	7.35	2.06
BOUBYAN BANK	0.681	-0.15	0.15	0.29	4.23	27.46	2.88	32.96	1.40	3.00
AGILITY	0.265	0.38	1.15	0.76	5.16	7.29	0.67	10.64	3.77	0.71
Saudi Arabia										
ARAMCO	24.98	0.32	-0.87	-1.46	-6.62	-10.94	4.14	15.34	7.11	6,044.19
SABIC	60.00	-0.17	-2.12	-1.64	-5.81	-10.45	1.15	85.88	5.67	179.97
STC	46.00	-0.43	-2.13	-3.36	1.43	15.00	2.52	20.31	4.13	229.96
AL-RAJHI BANK	96.50	0.94	0.00	-0.92	-5.39	2.01	2.88	19.17	2.81	385.94
NCB	34.95	0.87	0.14	-2.10	-2.51	4.64	1.07	9.77	5.44	209.67
Abu Dhabi										
ETISALAT.AD	17.40	-0.34	-0.11	0.00	2.96	6.62	2.97	10.98	4.77	151.32
FAB.AD	15.58	2.50	2.50	3.73	12.74	13.39	1.35	9.93	4.81	172.12
EMIRATES NBD	21.55	0.94	4.11	4.87	6.68	0.47	1.08	6.20	4.64	136.12
DB ISLAMIC DB	7.55	-0.13	0.00	-0.13	5.30	6.49	1.20	7.13	5.96	54.67
EMAR.DU	13.80	2.60	2.99	5.34	3.37	7.39	1.43	9.03	7.25	121.98
Qatar										
QNB	16.900	1.08	1.44	1.20	4.97	-2.26	1.37	9.93	4.14	156.10
INDUSTREIS QAT	12.010	-0.33	-1.56	-4.38	-6.83	-9.50	2.01	17.29	6.16	72.66
QA ISLAMIC BK	21.540	0.19	1.36	2.04	4.72	0.84	1.65	11.50	3.71	50.90
MASRAF AL RAYA	2.247	0.09	0.63	0.67	-0.13	-8.77	0.85	14.29	4.45	20.90
MESAIEED PETRO	1.380	0.07	-0.58	-2.13	-4.03	-7.69	1.07	24.39	4.13	17.34
Oman										
BANK MUSCAT	0.262	0.00	1.16	2.75	3.56	3.97	0.83	9.53	6.30	1.97
OMANTEL	0.818	0.12	0.25	0.00	-3.76	-12.98	0.92	7.95	6.72	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	0.220	0.92	2.33	1.38	-9.41	-6.67	0.64	7.57	6.49	0.21

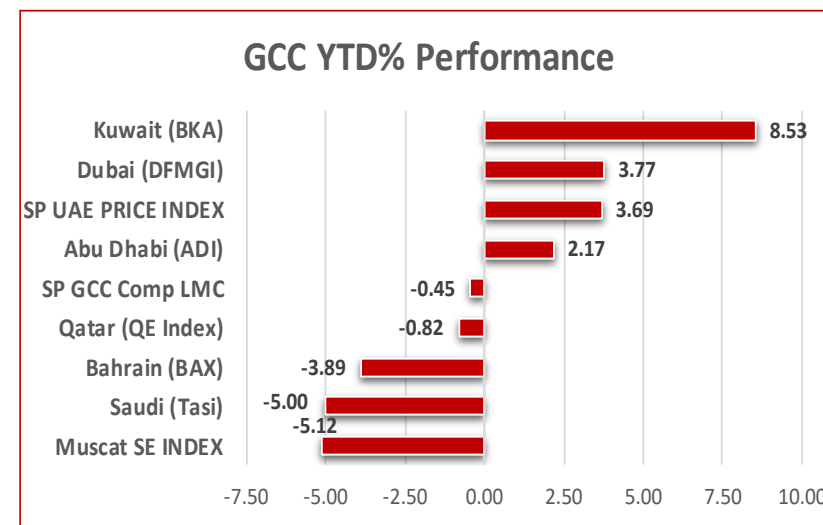
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
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 0.20%, the best performing sector today is consumer discretionary at 1.75%.

KSA

Aramco closed at 0.32%, Sabic closed at -0.17%. STC closed at -0.43% and Al-Rajhi closed at 0.94%.

UAE

ETISALAT.AD closed at -0.34%, FAB.AD closed at 2.50%.



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