



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

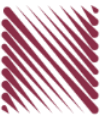
GCC DAILY MORNING BRIEF

Thursday, 8th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

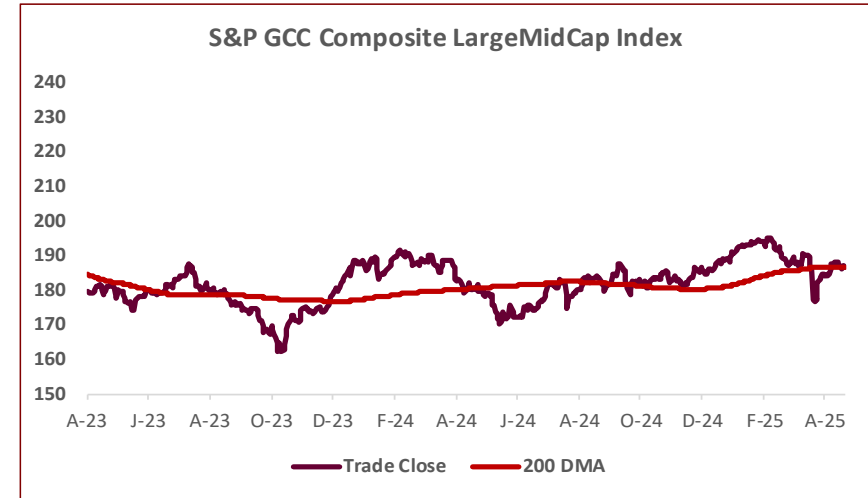


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,398.7	-0.31	-1.26	-2.34	-5.21	-5.30	2.07	15.76	3.81	9,305.87
Qatar (QE Index)	10,478.6	-0.06	0.30	0.18	2.40	-0.87	1.19	11.45	4.71	528.97
Dubai (DFMGI)	5,337.5	-0.29	0.87	0.57	4.73	3.47	1.72	10.19	5.29	798.22
Abu Dhabi (ADI)	9,611.0	-0.13	0.33	0.80	2.58	2.04	2.02	14.40	3.04	2,691.82
Bahrain (BAX)	1,911.5	0.15	-0.03	-0.03	-2.04	-3.75	0.85	8.49	5.25	7.41
Muscat SE INDEX	4,353.1	0.26	0.54	0.85	-0.32	-4.88	0.77	9.06	6.54	7.07
SP GCC Comp LMC	187.0	0.00	-0.13	-0.60	-1.65	-0.45	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	157.9	0.00	1.31	2.05	4.75	3.69				

Developed Markets										
MSCI World Index	3,697.5	0.28	-0.73	1.15	1.90	-0.28				
U.S. (S&P 500)	5,631.3	0.43	-0.97	1.12	0.35	-4.26	4.28	24.71	1.66	49,970.47
U.K. (FTSE 100)	8,559.3	-0.44	-0.43	0.76	-0.27	4.73	1.80	16.29	3.56	2,226.08
Japan (topix)	2,696.2	0.31	0.31	1.08	1.41	-3.19	1.38	13.66	2.38	940,128.17
Emerging Markets										
MSCI EM Index	1,137.4	0.00	0.37	2.21	3.27	5.76				
China (SSE Composite)	3,342.7	0.80	1.94	1.94	0.21	-0.27	1.36	12.00		44,025.04
India (Sensex)	80,746.8	0.13	0.30	0.63	4.30	3.34	4.38	22.61	1.16	157,495.06

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,007.2	0.21	0.73	0.60	-0.83	8.76	1.64	15.08	3.48	48.53
Kuwait Premier Index	8,665.8	0.36	1.21	1.31	-0.10	10.55	1.81	16.56	3.33	40.25
Kuwait Main Index	6,953.3	-0.51	-1.62	-2.82	-4.32	0.67	1.12	10.15	4.26	8.28
Kuwait Sector										
Banking	2,015.7	0.33	0.70	0.55	-1.39	11.37	1.93	16.21	3.05	30.51
Telecom	1,037.8	0.49	0.74	0.75	-1.15	1.97	1.55	10.65	7.34	3.16
Industrials	758.7	0.22	1.91	0.82	1.83	4.84	1.13	14.23	4.83	2.56
Financial Services	1,483.5	-0.09	0.30	0.29	-1.65	-1.79	1.15	12.63	3.30	4.96
Real Estate	1,600.7	-0.08	-0.22	0.61	5.51	18.29	1.12	18.28	1.83	3.40
Basic Materials	915.7	-0.40	-0.16	0.56	1.87	0.49	1.63	11.26	9.92	0.52
Health Care	580.6	0.00	0.00	0.00	1.75	26.69	1.99	22.88	1.81	
Consumer Staples	1,077.4	-1.41	7.45	2.64	9.16	7.88	2.28	21.21	2.35	0.33
Insurance	1,784.5	-0.89	-0.82	-1.42	-16.31	-13.17	0.92	8.75	3.51	0.73
Consumer Discretionary	2,399.4	0.88	3.58	3.43	1.65	13.03				
Energy	1,320.3	-5.01	-4.64	-4.75	-0.35	11.03	1.12	9.78	5.25	0.28
Technology	1,120.4	0.65	-1.28	-0.64	4.05	7.69	1.30			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 on Wednesday, as the Federal Reserve sees growing economic uncertainty and investors look toward U.S.-China trade talks this weekend. Brent crude futures fell \$1.03 a barrel, or 1.66%, to close at \$61.12 a barrel, while U.S. West Texas Intermediate crude fell \$1.02, or 1.73%, to settle at \$58.07 a barrel.

Kuwait Market

The market closed up by 0.21% at 8,007.2 value traded 103.4 million KD, Premier market value reached 74.3 million KD, closed up by 0.36% at 8,665.8.

KSA Market

The market closed down by -0.31% at 11,398.7.

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	0.956	0.10	0.10	0.42	-4.22	12.03	1.87	14.76	3.49	8.37
KFH	0.736	0.14	1.52	1.80	-0.02	6.55	2.08	16.77	2.77	13.61
ZAIN	0.478	0.42	1.27	1.06	-0.42	1.92	1.66	9.87	7.32	2.07
BOUBYAN BANK	0.678	-0.44	-0.29	-0.15	3.78	26.90	2.88	32.91	1.40	2.99
AGILITY	0.266	0.38	1.53	1.14	5.56	7.69	0.66	10.52	3.76	0.71
Saudi Arabia										
ARAMCO	24.84	-0.56	-1.43	-2.01	-7.14	-11.44	4.18	15.48	7.15	6,012.88
SABIC	59.20	-1.33	-3.43	-2.95	-7.06	-11.64	1.17	87.74	5.74	177.65
STC	45.95	-0.11	-2.23	-3.47	1.32	14.88	2.62	21.88	4.13	229.81
AL-RAJHI BANK	95.50	-1.04	-1.04	-1.95	-6.37	0.95	3.14	20.66	2.84	382.10
NCB	34.90	-0.14	0.00	-2.24	-2.65	4.49	1.07	9.75	5.44	209.46
Abu Dhabi										
ETISALAT.AD	17.22	-1.03	-1.15	-1.03	1.89	5.51	2.97	11.00	4.82	149.76
FAB.AD	15.66	0.51	3.03	4.26	13.31	13.97	1.32	9.69	4.79	173.01
EMIRATES NBD	21.65	0.46	4.59	5.35	7.18	0.93	1.03	5.95	4.62	136.75
DB ISLAMIC DB	7.60	0.66	0.66	0.53	6.00	7.19	1.20	7.13	5.92	55.03
EMAR.DU	13.60	-1.45	1.49	3.82	1.87	5.84	1.39	8.76	7.35	120.21
Qatar										
QNB	16.830	-0.41	1.02	0.78	4.53	-2.66	1.35	9.79	4.16	155.45
INDUSTREIS QAT	12.000	-0.08	-1.64	-4.46	-6.90	-9.57	1.96	16.44	6.17	72.60
QA ISLAMIC BK	21.250	-1.35	0.00	0.66	3.31	-0.51	1.63	11.35	3.76	50.21
MASRAF AL RAYA	2.284	1.65	2.28	2.33	1.51	-7.27	0.84	14.20	4.38	21.24
MESAIEED PETRO	1.386	0.43	-0.14	-1.70	-3.62	-7.29	1.08	24.53	4.11	17.41
Oman										
BANK MUSCAT	0.264	0.76	1.93	3.53	4.35	4.76	0.82	9.43	6.25	1.98
OMANTEL	0.816	-0.24	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	0.220	0.00	2.33	1.38	-9.41	-6.67	0.62	7.40	6.49	0.21

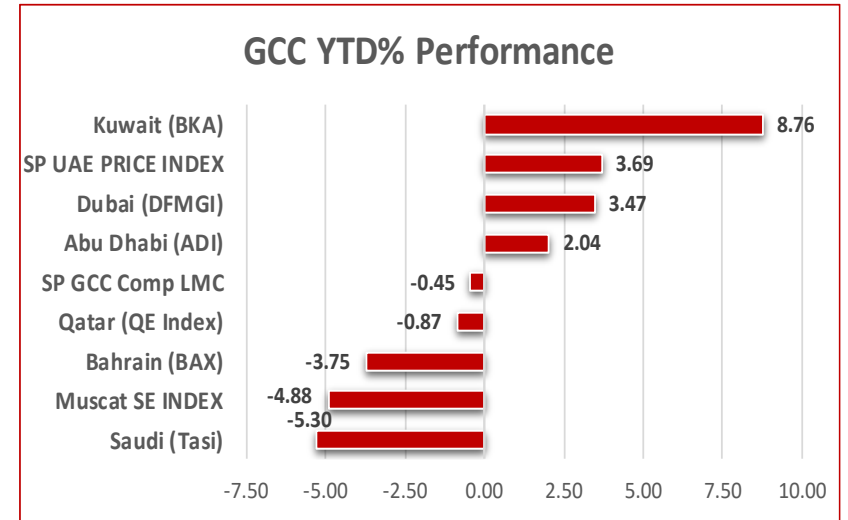
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
30-April. 25	26.30%	14.59%	0.06%	5.86%	8.98%	18.09%	13.71%	6.89%	7.96%
07-May. 25	26.53%	14.30%	0.07%	5.94%	8.94%	18.08%	13.74%	6.90%	7.16%

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 0.21%, the best performing sector today is consumer discretionary at 0.88%.

KSA

Aramco closed at -0.56%, Sabic closed at -1.33%. STC closed at -0.11% and Al-Rajhi closed at -1.04%.

UAE

ETISALAT.AD closed at -1.03%, FAB.AD closed at 0.51%.



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