

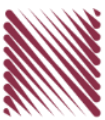


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 9th March 2025



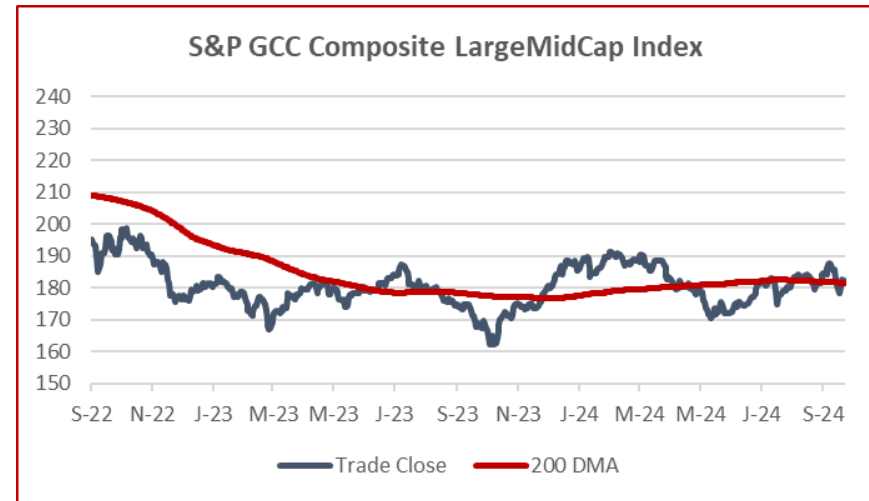


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,811.1	-0.74	-2.48	-2.48	-1.87	-1.87	2.14	17.84	3.52	9,695.47
Qatar (QE Index)	10,514.1	0.21	0.66	0.66	-0.54	-0.54	1.19	11.51	4.74	530.90
Dubai (DFMGI)	5,222.6	-0.97	-1.79	-1.79	1.24	1.24	1.68	9.96	5.36	777.61
Abu Dhabi (ADI)	9,447.8	-0.89	-1.22	-1.22	0.31	0.31	2.39	18.28	2.31	2,658.20
Bahrain (BAX)	1,973.9	-0.10	0.70	0.70	-0.61	-0.61	0.88	8.91	4.99	7.51
Muscat SE INDEX	4,395.5	-0.35	-0.91	-0.91	-3.96	-3.96	0.77	9.18	6.15	7.08
SP GCC Comp LMC	189.3	-0.24	-1.34	-1.34	0.73	0.73	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	153.1	-1.21	-2.11	-2.11	0.56	0.56				

Developed Markets										
MSCI World Index	3,740.4	0.25	-1.71	-1.71	0.88	0.88				
U.S. (S&P 500)	5,770.2	0.55	-3.10	-3.10	-1.89	-1.89	4.50	25.81	1.58	51,408.95
U.K. (FTSE 100)	8,679.9	-0.03	-1.47	-1.47	6.20	6.20	1.78	16.56	3.55	2,240.30
Japan (topix)	2,708.6	-1.56	0.99	0.99	-2.74	-2.74	1.41	13.71	2.32	943,542.59
Emerging Markets										
MSCI EM Index	1,128.6	-0.24	2.85	2.85	4.94	4.94				
China (SSE Composite)	3,372.5	-0.25	1.56	1.56	0.62	0.62	1.36	12.00		44,025.04
India (Sensex)	74,332.6	-0.01	1.55	1.55	-4.87	-4.87	4.02	20.95	1.21	145,884.19

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,119.4	-0.57	0.22	0.22	10.28	10.28	1.66	15.17	3.42	48.92
Kuwait Premier Index	8,663.7	-0.63	-0.34	-0.34	10.52	10.52	1.79	16.57	3.30	39.94
Kuwait Main Index	7,544.9	-0.31	2.86	2.86	9.23	9.23	1.26	10.64	3.95	8.98
Kuwait Sector										
Banking	2,047.6	-0.65	0.92	0.92	13.14	13.14	2.01	16.47	2.89	30.69
Telecom	1,033.3	-0.41	-3.33	-3.33	1.53	1.53	1.55	10.91	8.13	3.16
Industrials	752.6	-0.60	-1.34	-1.34	4.00	4.00	0.84	11.90	5.74	2.55
Financial Services	1,545.0	-0.73	-1.52	-1.52	2.28	2.28	1.26	13.04	2.71	5.16
Real Estate	1,576.0	-0.19	0.86	0.86	16.47	16.47	1.18	17.90	1.86	3.36
Basic Materials	919.8	-1.88	-1.30	-1.30	0.94	0.94	1.65	11.33	9.52	0.52
Health Care	530.3	0.00	2.11	2.11	15.70	15.70	1.77	17.92	1.98	
Consumer Staples	1,028.2	1.56	-0.80	-0.80	2.95	2.95	2.23	20.95	2.00	0.31
Insurance	2,101.3	0.81	1.77	1.77	2.24	2.24	1.10	10.61	3.90	0.85
Consumer Discretionary	2,365.6	-0.46	1.80	1.80	11.44	11.44				
Energy	1,343.4	-0.16	-1.55	-1.55	12.97	12.97	1.12	10.21	4.73	0.27
Technology	1,156.7	2.58	-28.38	-28.38	11.19	11.19	1.34			0.02
Utilities	405.3	-1.91	-0.64	-0.64	1.99	1.99				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices were up on Friday but retreated from session highs after U.S. President Donald Trump threatened sanctions on Russia if it fails to reach a cease-fire with Ukraine. Trump said in a post on Truth Social that he was “strongly considering” sanctions on Russian banks and tariffs on Russian products because its armed forces continue attacks in Ukraine. Brent crude futures were up \$1.04, or 1.5%, to \$70.50 a barrel. U.S. West Texas Intermediate futures gained 68 cents, or 1.02%, to close at \$67.04

Kuwait Market

The market closed down by -0.57% at 8,119.4 value traded 96.6 million KD, Premier market value reached 60.6 million KD, closed down by -0.63% at 8,663.7

KSA Market

The market closed down by -0.74% at 11,811.1

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	1.042	0.00	1.17	1.17	16.29	16.29	1.91	15.01	3.36	8.68
KFH	0.801	-0.50	0.00	0.00	7.37	7.37	2.25	17.27	2.75	13.70
ZAIN	0.469	-0.42	-4.48	-4.48	0.00	0.00	1.65	9.80	7.46	2.03
BOUBYAN BANK	0.668	-1.04	-0.30	-0.30	19.07	19.07	2.64	30.91	1.50	2.81
AGILITY	0.262	-1.87	-4.03	-4.03	6.07	6.07	0.68	10.93	7.63	0.70
Saudi Arabia										
ARAMCO	26.25	-1.13	-3.14	-3.14	-6.42	-6.42	4.35	16.12	6.76	6,352.50
SABIC	62.50	1.13	0.81	0.81	-6.72	-6.72	1.13	75.89	5.44	187.50
STC	44.60	-2.30	-1.44	-1.44	11.50	11.50	2.81	17.77	3.92	223.00
AL-RAJHI BANK	101.40	0.40	1.60	1.60	7.19	7.19	3.30	21.71	2.37	405.60
NCB	34.80	-1.00	-0.57	-0.57	4.19	4.19	1.07	10.13	5.46	208.80
Abu Dhabi										
ETISALAT.AD	16.70	0.00	0.12	0.12	2.33	2.33	3.19	13.51	4.88	145.24
FAB.AD	14.46	-0.83	0.70	0.70	4.37	4.37	1.21	9.71	5.23	158.33
EMIRATES NBD	20.80	0.24	-5.88	-5.88	-3.03	-3.03	1.04	5.84	4.81	131.39
DB ISLAMIC DB	7.45	-1.59	-3.62	-3.62	5.08	5.08	1.08	7.17	6.04	53.94
EMAR.DU	13.70	-0.36	1.11	1.11	6.61	6.61	1.42	8.96	7.30	121.09
Qatar										
QNB	16.650	0.30	0.30	0.30	-3.70	-3.70	1.36	9.87	4.20	154.25
INDUSTREIS QAT	13.250	0.00	0.15	0.15	-0.15	-0.15	2.12	17.85	5.58	80.22
QA ISLAMIC BK	20.900	-0.48	0.34	0.34	-2.15	-2.15	1.59	11.26	3.83	49.17
MASRAF AL RAYA	2.326	-1.19	0.26	0.26	-5.56	-5.56	0.86	14.81	4.30	21.75
MESAIEED PETRO	1.409	-0.63	-1.40	-1.40	-5.75	-5.75	1.08	24.63	4.05	17.71
Oman										
BANK MUSCAT	0.257	-0.39	1.18	1.18	1.98	1.98	0.79	9.55	6.03	1.93
OMANTEL	0.806	-0.25	-1.95	-1.95	-14.26	-14.26	0.95	9.54	7.44	0.60
BANK DHOFAR	0.151	0.00	0.00	0.00	-3.21	-3.21	0.61	13.71	4.34	0.45
NAT BANK OF OMAN	0.280	0.00	0.00	0.00	-5.41	-5.41	0.59	9.04	3.36	0.46
OMINVEST	0.335	0.90	0.30	0.30	1.52	1.52	0.71	7.61	5.97	0.22

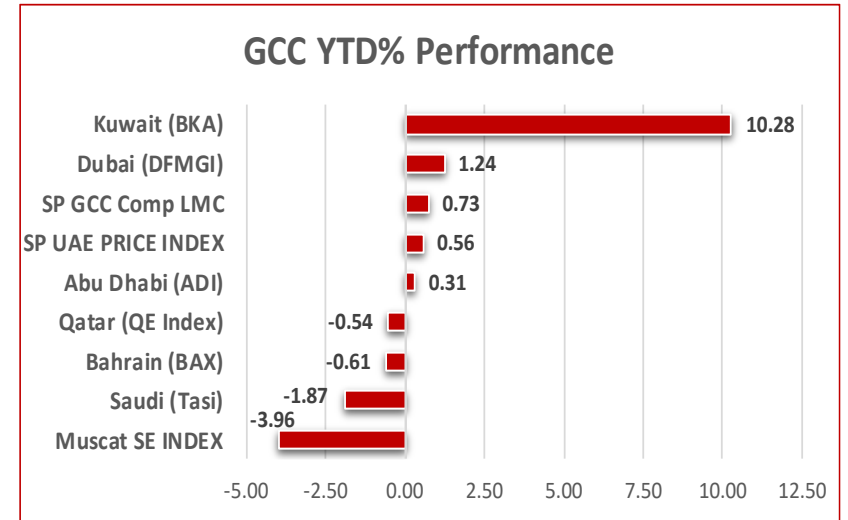
* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
26-Feb. 25	25.36%	15.51%	0.06%	4.12%	9.26%	17.93%	13.51%	6.64%	6.95%
05-Mar. 25	25.41%	15.46%	0.06%	4.22%	8.79%	18.09%	13.51%	6.68%	6.98%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



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Kuwait

The market is down today by -0.57%, the worst performing sector today is utilities at -1.91%.

KSA

Aramco closed today down by -1.13%, Sabic closed at 1.13%, STC closed at -2.30% and Al Rajhi closed at 0.40%.

UAE

ETISALAT.AD had closed flat today, FAB.AD closed with a with a negative performance at -0.83%.



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