



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Tuesday, 1st July 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices edged down on Tuesday, weighed by expectations of an OPEC+ output hike in August and concerns of an economic slowdown driven by prospects of higher U.S. tariffs. Brent crude futures for September delivery fell 16 cents, or 0.24%, to \$66.58 a barrel by 0000 GMT. U.S. West Texas Intermediate crude declined 20 cents, or 0.31%, to \$64.91 a barrel.

Kuwait Market

The market closed up by 0.2% at 8,455.2 value traded 183.6 million KD, Premier market value reached 130.7 million KD, closed up by 0.37% at 9,187.5.

KSA Market

The market closed 0.35% down at 11,164.0

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,164.0	-0.35	0.86	1.58	-7.16	-7.25	2.04	15.83	3.83	9,106.26
Qatar (QE Index)	10,749.5	-0.17	0.61	2.74	5.05	1.69	1.27	11.98	4.51	575.48
Dubai (DFMGI)	5,705.8	0.38	0.38	4.11	11.96	10.61	1.84	10.67	4.94	848.34
Abu Dhabi (ADI)	9,957.5	0.72	0.72	2.81	6.28	5.72	2.12	15.32	2.89	2,825.56
Bahrain (BAX)	1,943.8	0.33	1.19	1.19	-0.39	-2.12	0.85	8.62	5.17	7.55
Muscat SE INDEX	4,500.9	-0.14	-0.14	-1.32	3.06	-1.65	0.80	9.35	6.28	7.35
SP GCC Comp LMC	189.2	-0.11	0.96	3.12	-0.50	0.72	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	167.6	0.82	0.82	4.75	11.22	10.09				
Developed Markets										
MSCI World Index	4,026.4	0.43	0.43	4.22	10.96	8.59				
U.S. (S&P 500)	6,205.0	0.52	0.52	4.96	10.57	5.50	4.73	26.96	1.51	55,109.88
U.K. (FTSE 100)	8,761.0	-0.43	-0.43	-0.13	2.08	7.19	1.83	16.57	3.47	2,265.34
Japan (topix)	2,852.8	0.43	0.43	1.83	7.30	2.44	1.45	14.69	2.36	986,868.73
Emerging Markets										
MSCI EM Index	1,222.8	-0.47	-0.47	5.65	11.02	13.70				
China (SSE Composite)	3,444.4	0.59	0.59	2.90	3.26	2.76	1.36	12.00		44,025.04
India (Sensex)	83,606.5	-0.54	-0.54	2.65	8.00	7.00	4.54	24.25	1.17	165,181.44
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,455.2	0.20	1.95	4.22	4.72	14.84	1.72	15.74	3.28	51.26
Kuwait Premier Index	9,187.5	0.37	2.50	4.41	5.91	17.21	1.92	17.33	3.14	42.70
Kuwait Main Index	7,194.6	-0.70	-0.78	3.27	-1.00	4.16	1.14	10.29	4.04	8.57
Kuwait Sector										
Banking	2,162.2	0.69	3.24	6.20	5.78	19.47	2.06	17.36	2.87	32.64
Telecom	1,052.3	-0.03	0.12	1.28	0.23	3.40	1.58	10.17	7.20	3.22
Industrials	718.9	-0.57	-0.38	-7.98	-3.51	-0.65	1.10	14.53	5.24	2.45
Financial Services	1,539.9	-0.81	0.76	1.51	2.09	1.94	1.21	13.33	3.21	5.18
Real Estate	1,769.0	-1.80	-2.37	7.66	16.61	30.74	1.26	18.17	1.63	3.85
Basic Materials	855.4	-1.73	-0.63	-6.59	-4.83	-6.12	1.59	12.65	6.32	0.49
Health Care	569.7	-0.26	-0.98	-0.44	-0.15	24.31	1.72		1.79	
Consumer Staples	1,330.1	5.53	2.77	9.10	34.76	33.19	2.63	22.98	2.04	0.38
Insurance	1,902.4	-0.07	0.20	2.74	-10.78	-7.44	0.97	9.70	3.39	0.77
Consumer Discretionary	2,281.5	-1.10	-0.29	-2.36	-3.35	7.48				
Energy	1,513.4	3.44	2.44	2.16	14.22	27.27	1.18	9.61	5.31	0.30
Technology	1,105.8	-2.56	3.40	1.33	2.70	6.29	1.32			0.02
Utilities	386.8	0.00	1.38	2.80	-4.55	-2.65				

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Kuwait

The market is up today by 0.20%, the highest performing sector today is consumer staples at 5.53%.

KSA

Aramco closed at 0.08%, Sabic closed at -0.46%. STC closed at -1.53% and Al-Rajhi closed at -2.47%.

UAE

ETISALAT.AD closed at 1.85%, FAB.AD closed at 0.61%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.999	1.11	4.06	4.50	0.09	17.07	1.95	15.44	3.34	8.74
KFH	0.802	0.88	3.48	6.93	8.95	16.11	2.30	18.55	2.54	14.82
ZAIN	0.483	0.21	0.21	1.26	0.63	2.99	1.64	9.24	7.25	2.09
BOUBYAN BANK	0.720	0.28	2.56	7.14	10.20	34.76	3.05	34.85	1.32	3.18
AGILITY	0.196	-1.51	-3.92	-21.60	-22.22	-20.65	0.51	8.82	5.10	0.52
Saudi Arabia										
ARAMCO	24.32	0.08	0.08	-2.72	-9.08	-13.30	3.99	15.23	6.68	5,885.13
SABIC	54.65	-0.46	-0.46	-1.89	-14.21	-18.43	1.05	649.98	6.22	163.94
STC	42.54	-1.53	-1.87	1.53	-1.93	11.18	2.33	18.78	4.47	212.69
AL-RAJHI BANK	94.60	-2.47	-0.11	3.84	-7.25	0.00	2.82	18.79	2.86	378.38
NCB	36.12	-0.17	0.33	4.09	0.75	8.14	1.11	10.09	5.26	216.71
Abu Dhabi										
ETISALAT.AD	17.60	1.85	1.85	2.44	4.14	7.84	3.00	11.11	4.72	153.06
FAB.AD	16.60	0.61	0.61	3.11	20.12	20.82	1.44	10.58	4.52	183.39
EMIRATES NBD	22.80	-0.87	-0.87	1.79	12.87	6.29	1.14	6.56	4.39	144.01
DB ISLAMIC DB	9.07	-1.20	-1.20	9.94	26.50	27.93	1.44	8.56	4.96	65.67
EMAR.DU	13.60	1.12	1.12	3.42	1.87	5.84	1.50	8.40	7.35	120.20
Qatar										
QNB	17.350	-0.29	0.87	2.36	7.76	0.35	1.41	10.19	4.03	159.62
INDUSTREIS QAT	12.350	-0.96	0.41	4.22	-4.19	-6.93	2.07	17.78	5.99	74.42
QA ISLAMIC BK	22.150	0.23	0.68	4.98	7.68	3.70	1.70	11.83	3.61	52.13
MASRAF AL RAYA	2.328	-0.43	0.30	4.02	3.47	-5.48	0.88	14.80	4.30	21.56
MESAIEED PETRO	1.346	0.52	1.36	0.90	-6.40	-9.97	1.05	23.79	4.23	16.84
Oman										
BANK MUSCAT	0.275	0.00	0.00	0.36	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.842	0.24	0.24	-0.24	-0.94	-10.43	0.98	7.89	6.53	0.63
BANK DHOFAR	0.129	0.00	0.00	-12.24	-9.74	-16.11	0.54	11.32	5.00	0.39
NAT BANK OF OMAN	0.300	0.00	0.00	2.74	3.45	1.35	0.64	9.39	3.13	0.49
OMINVEST	0.219	0.00	0.00	-0.45	-9.82	-7.09	0.66	7.02	6.52	0.20

* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
18-June. 25	26.96%	14.09%	0.08%	6.70%	11.50%	18.11%	14.20%	6.98%	7.61%
25-June. 25	26.96%	14.00%	0.08%	7.37%	12.22%	4.96%	14.21%	6.95%	7.66%

End of Report

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