



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Thursday, 10th July 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices dropped on Thursday as the latest tariff announcements by U.S. President Donald Trump were perceived by market participants to threaten global economic growth and demand for the resource. Brent crude futures were down 22 cents, or 0.31%, at \$69.97 a barrel by 0052 GMT. U.S. West Texas Intermediate crude lost 27 cents, or 0.39%, to \$68.11 a barrel.

Kuwait Market

The market closed up by 0.58% at 8,545.3 value traded 138.2 million KD, Premier market value reached 84.3 million KD, closed up by 0.62% at 9,269.0.

KSA Market

The market closed -0.14% at 11,277.7

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,277.7	-0.14	0.30	1.02	1.02	-6.30	2.07	16.01	3.79	9,282.27
Qatar (QE Index)	10,829.9	-0.04	0.65	0.75	0.75	2.45	1.28	12.06	4.51	579.29
Dubai (DFMGI)	5,833.8	0.68	1.40	2.24	2.24	13.09	1.88	10.90	4.84	867.74
Abu Dhabi (ADI)	10,049.0	0.37	0.68	0.92	0.92	6.69	2.15	15.50	2.85	2,829.72
Bahrain (BAX)	1,963.5	0.14	0.86	1.01	1.01	-1.13	0.85	8.67	5.14	7.63
Muscat SE INDEX	4,596.7	0.95	1.03	2.13	2.13	0.44	0.97	9.13	5.87	10.42
SP GCC Comp LMC	191.8	0.10	0.62	1.37	1.37	2.10	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	171.3	0.48	1.29	2.18	2.18	12.48				
Developed Markets										
MSCI World Index	4,055.9	0.64	-0.14	0.73	0.73	9.39				
U.S. (S&P 500)	6,263.3	0.61	-0.26	0.94	0.94	6.49	4.79	27.20	1.49	55,633.51
U.K. (FTSE 100)	8,867.0	0.15	0.50	1.21	1.21	8.49	1.85	16.75	3.43	2,296.81
Japan (topix)	2,828.2	0.41	0.01	-0.87	-0.87	1.55	1.44	14.56	2.38	978,287.84
Emerging Markets										
MSCI EM Index	1,227.9	-0.30	-0.31	0.42	0.42	14.17				
China (SSE Composite)	3,493.0	-0.13	0.60	1.41	1.41	4.22	1.36	12.00		44,025.04
India (Sensex)	83,536.1	-0.21	0.12	-0.08	-0.08	6.91	4.52	24.35	1.18	165,052.09
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,545.3	0.58	1.74	1.07	1.07	16.06	1.74	15.85	3.27	51.61
Kuwait Premier Index	9,269.0	0.62	1.71	0.89	0.89	18.25	1.93	17.44	3.11	42.96
Kuwait Main Index	7,337.3	0.36	1.85	1.98	1.98	6.23	1.15	10.34	4.04	8.65
Kuwait Sector										
Banking	2,181.3	0.72	1.69	0.88	0.88	20.53	2.08	17.51	2.84	32.91
Telecom	1,074.5	0.04	0.04	2.11	2.11	5.58	1.61	10.38	7.06	3.28
Industrials	686.3	-0.33	0.10	-4.54	-4.54	-5.16	1.05	13.82	5.50	2.33
Financial Services	1,602.0	0.59	3.65	4.04	4.04	6.05	1.24	13.64	3.13	5.31
Real Estate	1,819.9	0.12	2.37	2.87	2.87	34.49	1.27	18.19	1.64	3.88
Basic Materials	877.7	1.93	3.19	2.60	2.60	-3.68	1.58	12.51	6.39	0.49
Health Care	486.4	-0.15	-11.22	-14.62	-14.62	6.13	1.49	15.95	2.06	
Consumer Staples	1,283.7	1.78	0.31	-3.49	-3.49	28.54	2.64	22.98	2.04	0.38
Insurance	1,881.7	-0.02	0.59	-1.09	-1.09	-8.44	0.96	9.58	3.43	0.76
Consumer Discretionary	2,277.2	-0.69	1.88	-0.19	-0.19	7.27				
Energy	1,680.3	8.27	11.26	11.03	11.03	41.30	1.25	10.15	5.01	0.32
Technology	1,505.9	3.50	12.50	36.18	36.18	44.76	1.69			0.02
Utilities	384.2	0.00	0.00	-0.68	-0.68	-3.31				

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Kuwait

The market is up today by 0.58%, the best performing sector today is energy at 8.27%.

KSA

Aramco closed at -0.88%, Sabic closed at -0.18%. STC closed at -0.19% and Al-Rajhi closed at 0.26%.

UAE

ETISALAT.AD closed at 0.56%, FAB.AD closed at -0.12%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	1.020	0.99	2.93	2.10	2.10	19.53	2.00	15.76	3.27	8.91
KFH	0.806	0.75	1.38	0.50	0.50	16.69	2.31	18.64	2.53	14.88
ZAIN	0.496	0.00	0.00	2.69	2.69	5.76	1.68	9.49	7.06	2.14
BOUBYAN BANK	0.719	0.56	1.27	-0.14	-0.14	34.57	3.04	34.80	1.32	3.17
AGILITY	0.158	-1.25	5.33	-19.39	-19.39	-36.03	0.41	7.11	6.33	0.42
Saudi Arabia										
ARAMCO	24.88	-0.88	0.40	2.30	2.30	-11.30	4.08	15.58	6.53	6,021.12
SABIC	56.00	-0.18	-1.32	2.47	2.47	-16.42	1.08	666.03	6.07	168.00
STC	42.70	-0.19	0.47	0.38	0.38	11.60	2.34	18.85	4.45	213.51
AL-RAJHI BANK	96.25	0.26	0.26	1.74	1.74	1.74	2.87	19.12	2.82	385.01
NCB	37.06	0.16	-0.70	2.60	2.60	10.96	1.14	10.36	5.13	222.37
Abu Dhabi										
ETISALAT.AD	17.90	0.56	1.70	1.70	1.70	9.68	3.05	11.30	4.64	155.67
FAB.AD	16.80	-0.12	-0.59	1.20	1.20	22.27	1.46	10.71	4.46	185.60
EMIRATES NBD	24.35	-0.41	3.18	6.80	6.80	13.52	1.21	7.00	4.11	153.81
DB ISLAMIC DB	9.30	0.65	1.42	2.54	2.54	31.17	1.48	8.78	4.84	67.34
EMAR.DU	14.00	0.36	0.36	2.94	2.94	8.95	1.54	8.65	7.14	123.74
Qatar										
QNB	17.480	-0.11	0.00	0.75	0.75	1.10	1.42	10.27	4.12	161.41
INDUSTREIS QAT	12.590	-0.16	0.72	1.94	1.94	-5.12	2.11	18.12	5.88	76.15
QA ISLAMIC BK	22.770	0.53	2.20	2.80	2.80	6.60	1.74	12.16	3.51	53.79
MASRAF AL RAYA	2.320	0.00	-0.17	-0.34	-0.34	-5.81	0.88	14.75	4.31	21.57
MESAIEED PETRO	1.348	0.15	1.13	0.15	0.15	-9.83	1.05	23.82	4.23	16.93
Oman										
BANK MUSCAT	0.273	0.74	-0.73	-0.73	-0.73	8.33	0.86	9.93	6.04	2.05
OMANTEL	0.844	0.00	-0.12	0.24	0.24	-10.21	0.99	7.91	6.52	0.63
BANK DHOFAR	0.128	0.79	-0.78	-0.78	-0.78	-16.76	0.54	11.23	5.04	0.39
NAT BANK OF OMAN	0.300	1.69	0.00	0.00	0.00	1.35	0.64	9.39	3.13	0.49
OMINVEST	0.221	-0.45	-0.45	0.91	0.91	-6.24	0.67	7.09	6.46	0.21

* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
02-July. 25	27.09%	14.06%	0.08%	7.53%	12.83%	5.05%	14.33%	7.03%	7.75%
09-July. 25	27.13%	14.04%	0.08%	7.53%	12.84%	5.01%	14.42%	7.03%	7.92%

End of Report

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