



شركة الاستثمارات الوطنية  
National Investments Company



## **GCC DAILY MORNING BRIEF**

**Sunday, 13<sup>th</sup> July 2025**

## NIC RESEARCH AND STUDIES DEP

## What Move the GCC markets

## Oil Prices

Oil prices rose more than 2% on Friday as investors weighed a tight prompt market against a potential large surplus this year forecast by the IEA, while U.S. tariffs and possible further sanctions on Russia were also in focus. Brent crude futures gained \$1.72, or 2.51%, to close at \$70.36 a barrel. U.S. West Texas Intermediate crude rose \$1.88, or 2.82%, to \$68.45 a barrel.

## Kuwait Market

The market closed up by 0.71% at 8,605.7 value traded 134.9 million KD, Premier market value reached 72.3 million KD, closed up by 0.88% at 9,350.9.

## KSA Market

The market closed -0.01% at 11,276.9

| * Market Watch           | Close Price | DTD   | WTD    | MTD    | QTD    | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
|--------------------------|-------------|-------|--------|--------|--------|-------|------|-------|----------------|-----------------------|
| <b>GCC Markets</b>       |             |       |        |        |        |       |      |       |                |                       |
| Saudi (Tasi)             | 11,276.9    | -0.01 | 0.29   | 1.01   | 1.01   | -6.31 | 2.06 | 15.99 | 3.80           | 9,316.34              |
| Qatar (QE Index)         | 10,827.2    | -0.02 | 0.63   | 0.72   | 0.72   | 2.42  | 1.28 | 12.03 | 4.51           | 580.00                |
| Dubai (DFMGI)            | 5,855.0     | 0.43  | 1.77   | 2.62   | 2.62   | 13.50 | 1.89 | 10.92 | 4.83           | 867.23                |
| Abu Dhabi (ADI)          | 10,064.8    | 0.17  | 0.83   | 1.08   | 1.08   | 6.86  | 2.15 | 15.51 | 2.85           | 2,829.18              |
| Bahrain (BAX)            | 1,960.9     | -0.13 | 0.72   | 0.88   | 0.88   | -1.26 | 0.85 | 8.66  | 5.14           | 7.62                  |
| Muscat SE INDEX          | 4,602.5     | 0.13  | 1.16   | 2.26   | 2.26   | 0.57  | 0.97 | 9.14  | 5.86           | 10.45                 |
| SP GCC Comp LMC          | 192.0       | 0.05  | 0.72   | 1.48   | 1.48   | 2.20  | 1.74 | 14.31 | 3.83           | 857.79                |
| SP UAE PRICE INDEX       | 171.8       | 0.33  | 1.63   | 2.52   | 2.52   | 12.86 |      |       |                |                       |
| <b>Developed Markets</b> |             |       |        |        |        |       |      |       |                |                       |
| MSCI World Index         | 4,046.8     | -0.42 | -0.36  | 0.51   | 0.51   | 9.14  |      |       |                |                       |
| U.S. (S&P 500)           | 6,259.8     | -0.33 | -0.31  | 0.88   | 0.88   | 6.43  | 4.81 | 27.33 | 1.49           | 55,925.67             |
| U.K. (FTSE 100)          | 8,941.1     | -0.38 | 1.34   | 2.06   | 2.06   | 9.40  | 1.86 | 16.91 | 3.40           | 2,316.34              |
| Japan (topix)            | 2,823.2     | 0.39  | -0.17  | -1.04  | -1.04  | 1.38  | 1.43 | 14.52 | 2.39           | 976,207.94            |
| <b>Emerging Markets</b>  |             |       |        |        |        |       |      |       |                |                       |
| MSCI EM Index            | 1,229.1     | -0.17 | -0.20  | 0.52   | 0.52   | 14.29 |      |       |                |                       |
| China (SSE Composite)    | 3,510.2     | 0.01  | 1.09   | 1.91   | 1.91   | 4.73  | 1.36 | 12.00 |                | 44,025.04             |
| India (Sensex)           | 82,500.5    | -0.83 | -1.12  | -1.32  | -1.32  | 5.58  | 4.37 | 24.04 | 1.19           | 162,888.52            |
|                          |             |       |        |        |        |       |      |       |                |                       |
| Description              | Close Price | DTD   | WTD    | MTD    | QTD    | YTD   | P/B  | P/E   | Dividend Yield | Market Cap (In LC Bn) |
| <b>Kuwait</b>            |             |       |        |        |        |       |      |       |                |                       |
| Kuwait All Share Index   | 8,605.7     | 0.71  | 2.46   | 1.78   | 1.78   | 16.88 | 1.76 | 16.07 | 3.22           | 52.27                 |
| Kuwait Premier Index     | 9,350.9     | 0.88  | 2.61   | 1.78   | 1.78   | 19.29 | 1.96 | 17.71 | 3.07           | 43.61                 |
| Kuwait Main Index        | 7,323.4     | -0.19 | 1.66   | 1.79   | 1.79   | 6.02  | 1.15 | 10.42 | 4.04           | 8.66                  |
| <b>Kuwait Sector</b>     |             |       |        |        |        |       |      |       |                |                       |
| Banking                  | 2,204.4     | 1.06  | 2.77   | 1.95   | 1.95   | 21.80 | 2.12 | 17.83 | 2.79           | 33.50                 |
| Telecom                  | 1,092.4     | 1.66  | 1.70   | 3.81   | 3.81   | 7.34  | 1.64 | 10.50 | 6.94           | 3.34                  |
| Industrials              | 686.7       | 0.06  | 0.15   | -4.49  | -4.49  | -5.11 | 1.05 | 13.78 | 5.51           | 2.32                  |
| Financial Services       | 1,600.1     | -0.12 | 3.53   | 3.91   | 3.91   | 5.93  | 1.24 | 13.72 | 3.12           | 5.33                  |
| Real Estate              | 1,795.3     | -1.35 | 0.98   | 1.48   | 1.48   | 32.68 | 1.25 | 18.21 | 1.66           | 3.83                  |
| Basic Materials          | 880.2       | 0.29  | 3.49   | 2.90   | 2.90   | -3.40 | 1.61 | 12.79 | 6.25           | 0.50                  |
| Health Care              | 480.8       | -1.16 | -12.25 | -15.61 | -15.61 | 4.90  | 1.47 | 15.95 | 2.09           |                       |
| Consumer Staples         | 1,295.2     | 0.90  | 1.21   | -2.62  | -2.62  | 29.69 | 2.71 | 23.62 | 1.98           | 0.39                  |
| Insurance                | 1,920.3     | 2.05  | 2.65   | 0.94   | 0.94   | -6.57 | 0.98 | 9.78  | 3.36           | 0.78                  |
| Consumer Discretionary   | 2,276.5     | -0.03 | 1.85   | -0.22  | -0.22  | 7.24  |      |       |                |                       |
| Energy                   | 1,697.2     | 1.01  | 12.38  | 12.15  | 12.15  | 42.72 | 1.36 | 11.14 | 4.58           | 0.34                  |
| Technology               | 1,455.0     | -3.38 | 8.70   | 31.58  | 31.58  | 39.86 | 1.69 |       |                | 0.02                  |
| Utilities                | 381.6       | -0.68 | -0.68  | -1.36  | -1.36  | -3.97 |      |       |                |                       |

## NIC RESEARCH AND STUDIES DEP

**Kuwait**

The market is up today by 0.71%, the best performing sector today is insurance at 2.05%.

**KSA**

Aramco closed at 0.64%, Sabic closed at -0.45%. STC closed at -0.89% and Al-Rajhi closed at -0.47%.

**UAE**

ETISALAT.AD closed at -0.45%, FAB.AD closed at -0.83%.

| * Description          | Close Price | DTD   | WTD   | MTD    | QTD    | YTD    | P/B  | P/E    | Dividend Yield | Market Cap (In LC Bn) |
|------------------------|-------------|-------|-------|--------|--------|--------|------|--------|----------------|-----------------------|
| <b>Blue Chip Watch</b> |             |       |       |        |        |        |      |        |                |                       |
| <b>Kuwait</b>          |             |       |       |        |        |        |      |        |                |                       |
| NBK                    | 1.039       | 1.86  | 4.84  | 4.00   | 4.00   | 21.76  | 2.03 | 16.05  | 3.21           | 9.08                  |
| KFH                    | 0.812       | 0.74  | 2.14  | 1.25   | 1.25   | 17.55  | 2.33 | 18.78  | 2.51           | 15.00                 |
| ZAIN                   | 0.506       | 2.02  | 2.02  | 4.76   | 4.76   | 7.89   | 1.72 | 9.68   | 6.92           | 2.19                  |
| BOUBYAN BANK           | 0.723       | 0.56  | 1.83  | 0.42   | 0.42   | 35.32  | 3.06 | 35.00  | 1.32           | 3.19                  |
| AGILITY                | 0.157       | -0.63 | 4.67  | -19.90 | -19.90 | -36.44 | 0.41 | 7.07   | 6.37           | 0.42                  |
| <b>Saudi Arabia</b>    |             |       |       |        |        |        |      |        |                |                       |
| ARAMCO                 | 25.04       | 0.64  | 1.05  | 2.96   | 2.96   | -10.73 | 4.11 | 15.68  | 6.49           | 6,059.68              |
| SABIC                  | 55.75       | -0.45 | -1.76 | 2.01   | 2.01   | -16.79 | 1.07 | 663.06 | 6.10           | 167.25                |
| STC                    | 42.32       | -0.89 | -0.42 | -0.52  | -0.52  | 10.61  | 2.32 | 18.68  | 4.49           | 211.60                |
| AL-RAJHI BANK          | 95.80       | -0.47 | -0.21 | 1.27   | 1.27   | 1.27   | 2.86 | 19.03  | 2.83           | 383.20                |
| NCB                    | 37.46       | 1.08  | 0.38  | 3.71   | 3.71   | 12.16  | 1.15 | 10.47  | 5.07           | 224.76                |
| <b>Abu Dhabi</b>       |             |       |       |        |        |        |      |        |                |                       |
| ETISALAT.AD            | 17.90       | -0.45 | 1.25  | 1.25   | 1.25   | 9.19   | 3.04 | 11.25  | 4.66           | 154.98                |
| FAB.AD                 | 16.78       | -0.83 | -1.54 | 0.24   | 0.24   | 21.11  | 1.44 | 10.61  | 4.51           | 183.83                |
| EMIRATES NBD           | 24.30       | 0.41  | 2.97  | 6.58   | 6.58   | 13.29  | 1.21 | 6.99   | 4.12           | 153.49                |
| DB ISLAMIC DB          | 9.24        | -0.22 | 0.76  | 1.87   | 1.87   | 30.32  | 1.47 | 8.72   | 4.87           | 66.90                 |
| EMAR.DU                | 14.20       | 1.43  | 1.79  | 4.41   | 4.41   | 10.51  | 1.56 | 8.78   | 7.04           | 125.51                |
| <b>Qatar</b>           |             |       |       |        |        |        |      |        |                |                       |
| QNB                    | 17.500      | 0.11  | 0.11  | 0.86   | 0.86   | 1.21   | 1.36 | 10.18  | 4.11           | 161.64                |
| INDUSTREIS QAT         | 12.720      | 1.03  | 1.76  | 3.00   | 3.00   | -4.14  | 2.13 | 18.31  | 5.82           | 76.96                 |
| QA ISLAMIC BK          | 22.650      | -0.53 | 1.66  | 2.26   | 2.26   | 6.04   | 1.73 | 12.10  | 3.53           | 53.52                 |
| MASRAF AL RAYA         | 2.322       | 0.09  | -0.09 | -0.26  | -0.26  | -5.72  | 0.88 | 14.77  | 4.31           | 21.59                 |
| MESAIEED PETRO         | 1.335       | -0.96 | 0.15  | -0.82  | -0.82  | -10.70 | 1.04 | 23.59  | 4.27           | 16.77                 |
| <b>Oman</b>            |             |       |       |        |        |        |      |        |                |                       |
| BANK MUSCAT            | 0.275       | 0.73  | 0.00  | 0.00   | 0.00   | 9.13   | 0.87 | 10.01  | 6.00           | 2.06                  |
| OMANTEL                | 0.852       | 0.95  | 0.83  | 1.19   | 1.19   | -9.36  | 1.00 | 7.98   | 6.46           | 0.64                  |
| BANK DHOFAR            | 0.129       | 0.78  | 0.00  | 0.00   | 0.00   | -16.11 | 0.54 | 11.32  | 5.00           | 0.39                  |
| NAT BANK OF OMAN       | 0.300       | 0.00  | 0.00  | 0.00   | 0.00   | 1.35   | 0.64 | 9.39   | 3.13           | 0.49                  |
| OMINVEST               | 0.220       | -0.45 | -0.90 | 0.46   | 0.46   | -6.67  | 0.67 | 7.06   | 6.49           | 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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