



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Thursday, 3rd July 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices eased on Thursday, reversing gains from the previous session, on concerns over weak U.S. demand after government data showed a surprise build in inventories in the world's biggest crude consumer. Brent crude futures fell 24 cents, or 0.35%, to \$68.87 a barrel by 0044 GMT after gaining 3% on Wednesday. U.S. West Texas Intermediate crude fell 24 cents, or 0.36%, to \$67.21 a barrel after climbing 3.1% previously.

Kuwait Market

The market closed down by -0.34% at 8,380.8 value traded 108.4 million KD, Premier market value reached 62.7 million KD, closed down by -0.55% at 9,083.5.

KSA Market

The market closed 0.07% at 11,129.6

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,129.6	0.07	0.55	-0.31	-0.31	-7.53	2.04	15.76	3.84	9,156.91
Qatar (QE Index)	10,699.2	0.01	0.14	-0.47	-0.47	1.21	1.26	11.93	4.53	573.32
Dubai (DFMGI)	5,669.2	-0.41	-0.26	-0.64	-0.64	9.90	1.83	10.60	4.97	841.51
Abu Dhabi (ADI)	9,919.8	-0.09	0.34	-0.38	-0.38	5.32	2.11	15.24	2.90	2,794.79
Bahrain (BAX)	1,950.3	0.32	1.52	0.33	0.33	-1.79	0.85	8.65	5.15	7.58
Muscat SE INDEX	4,524.8	0.25	0.39	0.53	0.53	-1.13	0.96	9.03	5.94	10.32
SP GCC Comp LMC	188.3	-0.08	0.47	-0.49	-0.49	0.23	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	166.4	-0.33	0.10	-0.71	-0.71	9.30				
Developed Markets										
MSCI World Index	4,036.3	0.37	0.68	0.24	0.24	8.86				
U.S. (S&P 500)	6,227.4	0.47	0.88	0.36	0.36	5.88	4.75	27.07	1.50	55,330.68
U.K. (FTSE 100)	8,774.7	-0.12	-0.28	0.16	0.16	7.36	1.83	16.56	3.46	2,272.03
Japan (topix)	2,826.0	-0.21	-0.51	-0.94	-0.94	1.48	1.43	14.55	2.39	977,687.79
Emerging Markets										
MSCI EM Index	1,230.2	0.08	0.14	0.61	0.61	14.39				
China (SSE Composite)	3,454.8	-0.09	0.89	0.30	0.30	3.07	1.36	12.00		44,025.04
India (Sensex)	83,409.7	-0.34	-0.77	-0.24	-0.24	6.75	4.52	24.30	1.18	165,030.31
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,380.8	-0.34	1.05	-0.88	-0.88	13.83	1.72	15.71	3.30	51.08
Kuwait Premier Index	9,083.5	-0.55	1.34	-1.13	-1.13	15.88	1.91	17.29	3.14	42.60
Kuwait Main Index	7,224.3	0.72	-0.37	0.41	0.41	4.59	1.13	10.26	4.11	8.48
Kuwait Sector										
Banking	2,138.4	-0.61	2.10	-1.10	-1.10	18.16	2.07	17.40	2.86	32.70
Telecom	1,064.6	0.21	1.29	1.17	1.17	4.61	1.60	10.27	7.14	3.25
Industrials	686.8	-0.96	-4.83	-4.47	-4.47	-5.10	1.06	13.91	5.46	2.34
Financial Services	1,548.7	0.29	1.33	0.57	0.57	2.52	1.20	13.24	3.23	5.15
Real Estate	1,779.8	0.78	-1.78	0.61	0.61	31.53	1.23	18.09	1.69	3.77
Basic Materials	852.2	-0.08	-1.01	-0.38	-0.38	-6.48	1.56	12.39	6.45	0.48
Health Care	556.2	2.77	-3.33	-2.37	-2.37	21.36	1.64		1.88	
Consumer Staples	1,218.4	0.87	-5.86	-8.40	-8.40	22.00	2.52	21.97	2.13	0.37
Insurance	1,897.8	0.04	-0.04	-0.24	-0.24	-7.66	0.97	9.66	3.40	0.77
Consumer Discretionary	2,235.7	-1.17	-2.30	-2.01	-2.01	5.32				
Energy	1,511.3	0.38	2.30	-0.14	-0.14	27.09	1.21	9.87	5.16	0.31
Technology	1,433.2	17.96	34.01	29.60	29.60	37.76	1.41			0.02
Utilities	384.2	0.69	0.69	-0.68	-0.68	-3.31				

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Kuwait

The market is down today by 0.34%, the lowest performing sector today is consumer discretionary at -1.17%.

KSA

Aramco closed at 0.78%, Sabc closed at 1.63%. STC closed at 0.38% and Al-Rajhi closed at -0.16%.

UAE

ETISALAT.AD closed at -0.57%, FAB.AD closed at -0.24%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.988	-0.70	2.92	-1.10	-1.10	15.78	1.93	15.27	3.37	8.64
KFH	0.792	-0.75	2.19	-1.25	-1.25	14.66	2.27	18.32	2.57	14.63
ZAIN	0.489	0.62	1.45	1.24	1.24	4.26	1.66	9.35	7.16	2.12
BOUBAYAN BANK	0.711	-0.42	1.28	-1.25	-1.25	33.07	3.01	34.41	1.34	3.14
AGILITY	0.153	-4.38	-25.00	-21.94	-21.94	-38.06	0.40	6.89	6.54	0.41
Saudi Arabia										
ARAMCO	24.55	0.78	1.03	0.95	0.95	-12.48	4.03	15.37	6.62	5,940.94
SABIC	56.00	1.63	2.00	2.47	2.47	-16.42	1.08	666.03	6.07	168.00
STC	41.98	0.38	-3.16	-1.32	-1.32	9.72	2.30	18.53	4.53	209.89
AL-RAJHI BANK	94.65	-0.16	-0.05	0.05	0.05	0.05	2.83	18.80	2.86	378.59
NCB	35.84	0.34	-0.44	-0.78	-0.78	7.31	1.10	10.01	5.30	215.03
Abu Dhabi										
ETISALAT.AD	17.34	-0.57	0.35	-1.48	-1.48	6.25	2.96	10.95	4.79	150.80
FAB.AD	16.66	-0.24	0.97	0.36	0.36	21.25	1.45	10.62	4.50	184.05
EMIRATES NBD	23.05	0.00	0.22	1.10	1.10	7.46	1.15	6.63	4.34	145.60
DB ISLAMIC DB	9.09	0.78	-0.98	0.22	0.22	28.21	1.45	8.58	4.95	65.82
EMAR.DU	13.45	-0.37	0.00	-1.10	-1.10	4.67	1.48	8.31	7.43	118.88
Qatar										
QNB	17.400	0.81	1.16	0.29	0.29	0.64	1.41	10.22	4.02	160.71
INDUSTREIS QAT	12.420	0.89	0.98	0.57	0.57	-6.41	2.08	17.88	5.96	75.14
QA ISLAMIC BK	22.110	-0.32	0.50	-0.18	-0.18	3.51	1.69	11.81	3.62	52.24
MASRAF AL RAYA	2.310	0.35	-0.47	-0.77	-0.77	-6.21	0.87	14.69	4.33	21.48
MESAEED PETRO	1.330	0.38	0.15	-1.19	-1.19	-11.04	1.03	23.50	4.29	16.71
Oman										
BANK MUSCAT	0.272	0.37	-1.09	-1.09	-1.09	7.94	0.86	9.90	6.07	2.04
OMANTEL	0.842	0.00	0.24	0.00	0.00	-10.43	0.98	7.89	6.53	0.63
BANK DHOFAR	0.129	0.00	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	0.222	-0.45	1.37	1.37	1.37	-5.82	0.67	7.12	6.44	0.21

* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBAYAN	WARBA
25-June. 25	26.96%	14.00%	0.08%	7.37%	12.22%	4.96%	14.21%	6.95%	7.66%
02-July. 25	27.09%	14.06%	0.08%	7.53%	12.83%	5.05%	14.33%	7.03%	7.75%

End of Report

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