



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Sunday, 6th July 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

At the end of the Friday session, oil futures settled at \$68.30 per barrel for the September-expiration Ice Brent contract and at \$66.50 per barrel for front month-August Nymex U.S. West Texas Intermediate crude.

Kuwait Market

The market closed up by 0.22% at 8,399.4 value traded 88.2 million KD, Premier market value reached 49.1 million KD, closed up by 0.32% at 9,112.7.

KSA Market

The market closed 1.03% at 11,244.5

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,244.5	1.03	1.59	0.72	0.72	-6.58	2.06	15.94	3.80	9,245.58
Qatar (QE Index)	10,759.5	0.56	0.70	0.09	0.09	1.78	1.27	12.00	4.50	576.16
Dubai (DFMGI)	5,753.3	0.09	1.22	0.83	0.83	11.53	1.86	10.78	4.89	857.01
Abu Dhabi (ADI)	9,981.5	0.01	0.96	0.24	0.24	5.97	2.13	15.37	2.88	2,814.57
Bahrain (BAX)	1,946.9	-0.17	1.35	0.16	0.16	-1.96	0.85	8.63	5.16	7.56
Muscat SE INDEX	4,550.0	0.56	0.95	1.09	1.09	-0.58	0.96	9.09	5.91	10.39
SP GCC Comp LMC	190.6	0.00	1.71	0.75	0.75	1.47	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	169.1	0.00	1.70	0.87	0.87	11.05				
Developed Markets										
MSCI World Index	4,061.4	-0.04	1.31	0.87	0.87	9.54				
U.S. (S&P 500)	6,279.4	0.00	1.72	1.20	1.20	6.76	4.82	27.43	1.48	56,089.77
U.K. (FTSE 100)	8,822.9	0.00	0.27	0.71	0.71	7.95	1.84	16.66	3.45	2,287.17
Japan (topix)	2,828.0	-0.04	-0.44	-0.87	-0.87	1.55	1.44	14.56	2.38	977,981.86
Emerging Markets										
MSCI EM Index	1,231.6	-0.43	0.25	0.72	0.72	14.52				
China (SSE Composite)	3,472.3	0.32	1.40	0.81	0.81	3.60	1.36	12.00		44,025.04
India (Sensex)	83,432.9	0.23	-0.74	-0.21	-0.21	6.77	4.51	24.31	1.18	164,976.76
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,399.4	0.22	1.28	-0.66	-0.66	14.08	1.72	15.68	3.30	51.02
Kuwait Premier Index	9,112.7	0.32	1.67	-0.81	-0.81	16.25	1.91	17.26	3.15	42.50
Kuwait Main Index	7,203.6	-0.29	-0.65	0.13	0.13	4.29	1.14	10.26	4.10	8.51
Kuwait Sector										
Banking	2,145.1	0.31	2.42	-0.79	-0.79	18.52	2.06	17.35	2.87	32.60
Telecom	1,074.2	0.90	2.19	2.07	2.07	5.55	1.61	10.38	7.06	3.28
Industrials	685.6	-0.17	-4.99	-4.64	-4.64	-5.26	1.04	13.76	5.52	2.31
Financial Services	1,545.6	-0.20	1.13	0.37	0.37	2.32	1.20	13.23	3.22	5.15
Real Estate	1,777.8	-0.11	-1.89	0.50	0.50	31.39	1.24	18.15	1.68	3.79
Basic Materials	850.5	-0.19	-1.20	-0.57	-0.57	-6.66	1.56	12.36	6.47	0.48
Health Care	547.9	-1.49	-4.77	-3.83	-3.83	19.55	1.66		1.86	
Consumer Staples	1,279.7	5.03	-1.12	-3.79	-3.79	28.14	2.67	23.34	2.01	0.39
Insurance	1,870.8	-1.42	-1.47	-1.66	-1.66	-8.98	0.95	9.52	3.45	0.76
Consumer Discretionary	2,235.2	-0.02	-2.32	-2.03	-2.03	5.29				
Energy	1,510.2	-0.07	2.22	-0.21	-0.21	27.00	1.21	9.89	5.15	0.31
Technology	1,338.6	-6.60	25.17	21.05	21.05	28.67	1.56			0.02
Utilities	384.2	0.00	0.69	-0.68	-0.68	-3.31				

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Kuwait

The market is up today by 0.22%, the best performing sector today is consumer staples at 5.03%.

KSA

Aramco closed at 0.94%, Sabic closed at 1.34%. STC closed at 1.24% and Al-Rajhi closed at 1.43%.

UAE

ETISALAT.AD closed at 0.57%, FAB.AD closed at -1.63%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.991	0.30	3.23	-0.80	-0.80	16.13	1.94	15.31	3.36	8.66
KFH	0.795	0.38	2.58	-0.87	-0.87	15.09	2.28	18.39	2.56	14.69
ZAIN	0.496	1.43	2.90	2.69	2.69	5.76	1.68	9.49	7.06	2.15
BOUBYAN BANK	0.710	-0.14	1.14	-1.39	-1.39	32.89	3.00	34.37	1.34	3.13
AGILITY	0.150	-1.96	-26.47	-23.47	-23.47	-39.27	0.39	6.75	6.67	0.40
Saudi Arabia										
ARAMCO	24.78	0.94	1.98	1.89	1.89	-11.66	4.07	15.52	6.56	5,996.76
SABIC	56.75	1.34	3.37	3.84	3.84	-15.30	1.09	674.95	5.99	170.25
STC	42.50	1.24	-1.96	-0.09	-0.09	11.08	2.33	18.76	4.47	212.50
AL-RAJHI BANK	96.00	1.43	1.37	1.48	1.48	1.48	2.87	19.07	2.82	384.00
NCB	37.32	4.13	3.67	3.32	3.32	11.74	1.15	10.43	5.09	223.92
Abu Dhabi										
ETISALAT.AD	17.50	0.57	1.85	0.00	0.00	7.84	3.00	11.11	4.72	153.06
FAB.AD	17.18	-1.63	2.42	1.81	1.81	23.00	1.47	10.78	4.44	186.70
EMIRATES NBD	23.60	1.29	2.61	3.51	3.51	10.02	1.18	6.79	4.24	149.07
DB ISLAMIC DB	9.17	-0.33	-0.11	1.10	1.10	29.34	1.46	8.65	4.91	66.40
EMAR.DU	13.95	0.00	3.72	2.57	2.57	8.56	1.54	8.62	7.17	123.30
Qatar										
QNB	17.480	0.46	1.63	0.75	0.75	1.10	1.42	10.27	4.00	161.45
INDUSTREIS QAT	12.500	0.64	1.63	1.21	1.21	-5.80	2.09	17.99	5.92	75.63
QA ISLAMIC BK	22.280	0.77	1.27	0.59	0.59	4.31	1.71	11.90	3.59	52.65
MASRAF AL RAYA	2.324	0.61	0.13	-0.17	-0.17	-5.64	0.88	14.78	4.30	21.61
MESAIEED PETRO	1.333	0.23	0.38	-0.97	-0.97	-10.84	1.04	23.56	4.28	16.75
Oman										
BANK MUSCAT	0.275	1.10	0.00	0.00	0.00	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.845	0.36	0.60	0.36	0.36	-10.11	0.99	7.92	6.51	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	0.00	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	BOUBYAN	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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CONTACT US

National Investments Company K.S.C.P.

P. O. Box 25667, Safat 13117

State of Kuwait - +965 2226 6608

@ nic | www.nic.com.kw