



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Tuesday, 10th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices edged up on Tuesday as market participants waited for the outcome of U.S.-China talks that could pave the way for easing trade tensions and improve fuel demand. Brent crude futures edged up 12 cents to \$67.16 a barrel.

Kuwait Market

The market closed up by 0.55% at 8,159.6 value traded 86.7 million KD, Premier market value reached 71.3 million KD, closed up by 0.42% at 8,854.2.

KSA Market

The market closed up by 1.59% at 11,004.5

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,004.5	1.59	0.13	0.13	-8.49	-8.57	2.00	15.54	3.88	9,164.58
Qatar (QE Index)	10,558.3	-0.56	0.91	0.91	3.18	-0.12	1.24	11.77	4.59	566.07
Dubai (DFMGI)	5,592.8	1.03	1.03	2.05	9.74	8.41	1.80	10.43	5.05	828.66
Abu Dhabi (ADI)	9,748.1	0.13	0.13	0.65	4.05	3.49	2.06	14.91	2.97	2,749.63
Bahrain (BAX)	1,923.1	0.10	0.11	0.11	-1.45	-3.16	0.84	8.46	5.25	7.47
Muscat SE INDEX	4,578.8	0.56	0.39	0.39	4.85	0.05	0.82	9.51	6.19	7.46
SP GCC Comp LMC	184.7	0.02	0.02	0.66	-2.88	-1.69	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	162.0	0.33	0.33	1.22	7.47	6.38				
Developed Markets										
MSCI World Index	3,919.2	0.11	0.11	1.44	8.01	5.70				
U.S. (S&P 500)	6,005.9	0.09	0.09	1.59	7.02	2.11	4.58	26.16	1.55	53,548.53
U.K. (FTSE 100)	8,832.3	-0.06	-0.06	0.68	2.91	8.07	1.84	16.70	3.44	2,288.90
Japan (topix)	2,785.4	0.58	0.58	-0.58	4.76	0.02	1.42	14.32	2.42	965,053.70
Emerging Markets										
MSCI EM Index	1,193.8	0.92	0.92	3.15	8.39	11.00				
China (SSE Composite)	3,399.8	0.43	0.43	1.56	1.92	1.43	1.36	12.00		44,025.04
India (Sensex)	82,445.2	0.31	0.31	1.22	6.50	5.51	4.33	23.60	1.18	160,548.26
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,159.6	0.55	0.58	0.58	1.06	10.83	1.68	15.26	3.40	49.57
Kuwait Premier Index	8,854.2	0.42	0.63	0.63	2.07	12.95	1.85	16.77	3.24	41.30
Kuwait Main Index	6,991.4	1.23	0.35	0.35	-3.80	1.22	1.13	10.10	4.21	8.27
Kuwait Sector										
Banking	2,050.1	0.55	0.69	0.69	0.29	13.28	1.97	16.58	3.01	31.16
Telecom	1,043.5	0.07	0.43	0.43	-0.61	2.53	1.57	10.10	7.27	3.19
Industrials	779.5	0.61	-0.22	-0.22	4.63	7.72	1.21	15.69	4.86	2.64
Financial Services	1,510.6	0.37	-0.42	-0.42	0.15	0.00	1.17	12.96	3.33	5.04
Real Estate	1,672.6	1.34	1.79	1.79	10.25	23.61	1.21	17.73	1.75	3.57
Basic Materials	905.3	-0.05	-1.15	-1.15	0.71	-0.65	1.66	13.16	6.08	0.51
Health Care	598.2	1.99	4.55	4.55	4.84	30.54	2.02		1.75	
Consumer Staples	1,200.7	0.09	-1.52	-1.52	21.65	20.23	2.51	21.76	2.14	0.36
Insurance	1,888.1	3.93	1.97	1.97	-11.45	-8.13	0.96	9.61	3.42	0.76
Consumer Discretionary	2,339.6	-0.88	0.12	0.12	-0.89	10.21				
Energy	1,502.6	-0.95	1.44	1.44	13.41	26.36	1.21	9.89	5.17	0.31
Technology	1,091.3	-1.96	0.00	0.00	1.35	4.90	1.27			0.02
Utilities	379.0	0.00	0.70	0.70	-6.49	-4.64				

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Kuwait

The market is up today by 0.55 %, the best performing sector today is insurance 3.93%.

KSA

Aramco closed at -0.08%, Sabic closed at -0.55%. STC closed at 2.26% and Al-Rajhi closed at 3.67%.

UAE

ETISALAT.AD closed at 0.58%, FAB.AD closed at 0.98%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.951	0.11	-0.52	-0.52	-4.72	11.45	1.86	14.69	3.51	8.31
KFH	0.754	0.53	0.53	0.53	2.43	9.16	2.16	17.44	2.70	13.93
ZAIN	0.476	-0.21	-0.21	-0.21	-0.83	1.49	1.61	9.10	7.35	2.06
BOUBYAN BANK	0.674	-0.30	0.30	0.30	3.16	26.15	2.85	32.62	1.41	2.97
AGILITY	0.249	0.00	-0.40	-0.40	-1.19	0.81	0.65	11.21	4.02	0.67
Saudi Arabia										
ARAMCO	24.80	-0.08	-0.80	-0.80	-7.29	-11.59	4.07	15.53	6.55	6,001.60
SABIC	55.20	0.55	-0.90	-0.90	-13.34	-17.61	1.06	656.52	6.16	165.60
STC	43.00	2.26	2.63	2.63	-0.87	12.39	2.35	18.98	4.42	215.00
AL-RAJHI BANK	93.30	3.67	2.41	2.41	-8.53	-1.37	2.79	18.53	2.90	373.20
NCB	34.25	0.88	-1.30	-1.30	-4.46	2.54	1.05	9.57	5.55	205.50
Abu Dhabi										
ETISALAT.AD	17.32	0.58	0.58	0.81	2.49	6.13	2.96	10.93	4.79	150.63
FAB.AD	16.42	0.98	0.98	1.99	18.81	19.51	1.42	10.47	4.57	181.40
EMIRATES NBD	22.00	-0.45	-0.45	-1.79	8.91	2.56	1.10	6.33	4.55	138.97
DB ISLAMIC DB	8.59	1.18	1.18	4.12	19.80	21.16	1.37	8.11	5.24	62.20
EMAR.DU	13.25	-0.75	-0.75	0.76	-0.75	3.11	1.46	8.19	7.55	117.11
Qatar										
QNB	17.050	0.00	0.59	0.59	5.90	-1.39	1.38	10.02	4.11	157.48
INDUSTREIS QAT	12.150	0.00	2.53	2.53	-5.74	-8.44	2.03	17.49	6.09	73.51
QA ISLAMIC BK	21.860	-0.18	3.60	3.60	6.27	2.34	1.67	11.68	3.66	51.65
MASRAF AL RAYA	2.238	-1.28	0.00	0.00	-0.53	-9.14	0.85	14.23	4.47	20.81
MESAIEED PETRO	1.318	-1.20	-1.20	-1.20	-8.34	-11.84	1.02	23.29	4.32	16.56
Oman										
BANK MUSCAT	0.28	2.94	2.19	2.19	10.67	11.11	0.88	10.19	5.89	2.10
OMANTEL	0.845	0.00	0.12	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.141	0.00	-4.08	-4.08	-1.35	-8.30	0.59	12.37	4.58	0.43
NAT BANK OF OMAN	0.300	2.74	2.74	2.74	3.45	1.35	0.64	9.39	3.13	0.49
OMINVEST	0.220	-1.35	0.00	0.00	-9.41	-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
21-May. 25	26.74%	14.34%	0.07%	6.22%	9.09%	18.06%	13.84%	6.94%	7.44%
28-May. 25	26.78%	14.20%	0.07%	6.44%	8.96%	18.01%	13.94%	6.92%	7.46%

End of Report

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