



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Wednesday, 11th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices fell in early trade on Wednesday as markets were assessing the outcome of U.S.-China trade talks, yet to be reviewed by President Donald Trump, with weak oil demand from China and OPEC+ production increases weighing on the market. Brent crude futures lost 24 cents, or 0.36%, to trade at \$66.63 a barrel.

Kuwait Market

The market closed up by 0.7% at 8,217.0 value traded 101.9 million KD, Premier market value reached 84.5 million KD, closed up by 0.79% at 8,924.6.

KSA Market

The market closed as Eid Al Adha Holiday.

* 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)	10,697.1	1.31	1.31	2.24	4.54	1.19	1.26	11.92	4.53	572.91
Dubai (DFMGI)	5,599.5	0.12	1.15	2.17	9.87	8.54	1.81	10.44	5.04	832.09
Abu Dhabi (ADI)	9,796.2	0.49	0.63	1.15	4.56	4.00	2.08	15.00	2.95	2,769.28
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	4,582.5	0.08	0.08	0.47	4.93	0.13	0.81	9.47	6.21	7.43
SP GCC Comp LMC	185.4	0.39	0.41	1.05	-2.50	-1.30	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	162.9	0.57	0.90	1.80	8.09	6.99				
Developed Markets										
MSCI World Index	3,934.9	0.40	0.52	1.85	8.44	6.12				
U.S. (S&P 500)	6,038.8	0.55	0.64	2.15	7.61	2.67	4.58	26.18	1.55	53,532.10
U.K. (FTSE 100)	8,853.1	0.24	0.17	0.92	3.15	8.32	1.84	16.73	3.44	2,293.20
Japan (topix)	2,786.2	0.03	0.61	-0.55	4.80	0.05	1.43	14.33	2.42	965,609.18
Emerging Markets										
MSCI EM Index	1,201.1	0.62	1.54	3.78	9.05	11.68				
China (SSE Composite)	3,384.8	-0.44	-0.02	1.12	1.47	0.99	1.36	12.00		44,025.04
India (Sensex)	82,391.7	-0.06	0.25	1.15	6.43	5.44	4.33	23.58	1.18	160,522.68
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,217.0	0.70	0.70	1.29	1.77	11.61	1.68	15.26	3.40	49.57
Kuwait Premier Index	8,924.6	0.79	0.79	1.43	2.88	13.85	1.85	16.77	3.24	41.30
Kuwait Main Index	7,007.9	0.24	0.24	0.59	-3.57	1.46	1.13	10.10	4.21	8.27
Kuwait Sector										
Banking	2,071.5	1.04	1.04	1.74	1.34	14.46	1.97	16.58	3.01	31.16
Telecom	1,045.7	0.21	0.21	0.65	-0.39	2.75	1.57	10.10	7.27	3.19
Industrials	778.8	-0.09	-0.09	-0.31	4.53	7.63	1.21	15.69	4.86	2.64
Financial Services	1,508.2	-0.16	-0.16	-0.57	-0.01	-0.16	1.17	12.96	3.33	5.04
Real Estate	1,670.5	-0.13	-0.13	1.66	10.11	23.45	1.21	17.73	1.75	3.57
Basic Materials	912.2	0.76	0.76	-0.40	1.48	0.10	1.66	13.16	6.08	0.51
Health Care	602.0	0.64	0.64	5.21	5.51	31.36	2.02		1.75	
Consumer Staples	1,291.7	7.58	7.58	5.95	30.87	29.34	2.51	21.76	2.14	0.36
Insurance	1,896.5	0.45	0.45	2.43	-11.05	-7.72	0.96	9.61	3.42	0.76
Consumer Discretionary	2,327.6	-0.51	-0.51	-0.39	-1.40	9.65				
Energy	1,502.8	0.01	0.01	1.45	13.42	26.38	1.21	9.89	5.17	0.31
Technology	1,091.3	0.00	0.00	0.00	1.35	4.90	1.27			0.02
Utilities	384.2	1.39	1.39	2.10	-5.19	-3.31				

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Kuwait
The market is up today by 0.7 %, the best performing sector today is consumer staples 7.58%.

KSA
Aramco closed at -0.08%, Sabc closed at -0.55%. STC closed at 2.26% and Al-Rajhi closed at 3.67%. (close date 4th June 2025).

UAE
ETISALAT.AD closed at 1.96%, 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	0.956	0.53	0.53	0.00	-4.22	12.03	1.87	14.77	3.49	8.35
KFH	0.765	1.46	1.46	2.00	3.92	10.75	2.20	17.69	2.66	14.13
ZAIN	0.479	0.63	0.63	0.42	-0.21	2.13	1.62	9.16	7.31	2.07
BOUBYAN BANK	0.679	0.74	0.74	1.04	3.93	27.09	2.87	32.87	1.40	2.99
AGILITY	0.252	1.20	1.20	0.80	0.00	2.02	0.65	11.34	3.97	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	17.66	1.96	2.56	2.79	4.50	8.21	3.01	11.15	4.70	153.57
FAB.AD	16.46	0.24	1.23	2.24	19.10	19.80	1.43	10.49	4.56	181.82
EMIRATES NBD	22.40	1.82	1.36	0.00	10.89	4.43	1.12	6.44	4.46	141.48
DB ISLAMIC DB	8.60	0.12	1.30	4.24	19.94	21.30	1.37	8.12	5.23	62.26
EMAR.DU	13.25	0.00	-0.75	0.76	-0.75	3.11	1.46	8.19	7.55	117.10
Qatar										
QNB	17.290	1.41	1.41	2.01	7.39	0.00	1.40	10.16	4.05	159.57
INDUSTREIS QAT	12.180	0.25	0.25	2.78	-5.51	-8.21	2.04	17.53	6.08	73.63
QA ISLAMIC BK	22.350	2.24	2.24	5.92	8.65	4.63	1.71	11.94	3.58	52.77
MASRAF AL RAYA	2.269	1.39	1.39	1.39	0.84	-7.88	0.86	14.43	4.41	21.08
MESAEED PETRO	1.340	1.67	1.67	0.45	-6.82	-10.37	1.04	23.68	4.25	16.82
Oman										
BANK MUSCAT	0.274	-2.14	-2.14	0.00	8.30	8.73	0.86	9.97	6.02	2.06
OMANTEL	0.846	0.12	0.12	0.24	-0.47	-10.00	0.99	7.93	6.50	0.63
BANK DHOFAR	0.145	2.84	2.84	-1.36	1.45	-5.70	0.61	12.72	4.45	0.44
NAT BANK OF OMAN	0.300	0.00	0.00	2.74	3.45	1.35	0.64	9.39	3.13	0.49
OMINVEST	0.220	0.00	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
28-May. 25	26.78%	14.20%	0.07%	6.44%	8.96%	18.01%	13.94%	6.92%	7.46%
04-June. 25	26.84%	13.91%	0.02%	6.56%	9.40%	18.03%	14.05%	6.90%	7.37%

End of Report

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