



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Thursday, 12th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices edged higher on Thursday to their highest in more than two months, after U.S. President Donald Trump said U.S. personnel were being moved out of the Middle East, which raised fear that escalating tensions with Iran could disrupt supply. Brent crude futures rose 15 cents, 0.2%, to \$69.92 a barrel.

Kuwait Market

The market closed up by 0.7% at 8,268.5 value traded 94.7 million KD, Premier market value reached 73.7 million KD, closed up by 0.65% at 8,982.9.

KSA Market

The market closed at stable level 11,005.0.

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,005.0	0.00	0.00	0.13	-8.48	-8.57	2.00	15.54	3.88	9,164.58
Qatar (QE Index)	10,713.4	0.15	1.47	2.39	4.69	1.35	1.26	11.92	4.53	572.91
Dubai (DFMGI)	5,595.5	-0.07	1.08	2.10	9.80	8.47	1.81	10.44	5.04	832.09
Abu Dhabi (ADI)	9,804.8	0.09	0.72	1.24	4.65	4.10	2.08	15.01	2.95	2,777.14
Bahrain (BAX)	1,920.6	-0.13	-0.13	-0.02	-1.58	-3.29	0.83	8.45	5.26	7.46
Muscat SE INDEX	4,591.8	0.20	0.28	0.67	5.15	0.33	0.81	9.47	6.21	7.43
SP GCC Comp LMC	185.6	0.10	0.51	1.15	-2.40	-1.20	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	162.9	0.02	0.92	1.82	8.11	7.01				
Developed Markets										
MSCI World Index	3,929.4	-0.14	0.37	1.71	8.29	5.97				
U.S. (S&P 500)	6,022.2	-0.27	0.36	1.87	7.31	2.39	4.61	26.32	1.54	53,904.37
U.K. (FTSE 100)	8,864.4	0.13	0.30	1.05	3.28	8.46	1.84	16.73	3.44	2,293.20
Japan (topix)	2,788.7	0.09	0.70	-0.46	4.89	0.14	1.43	14.34	2.42	966,866.91
Emerging Markets										
MSCI EM Index	1,209.0	0.65	2.20	4.46	9.77	12.41				
China (SSE Composite)	3,402.3	0.52	0.50	1.64	2.00	1.51	1.36	12.00		44,025.04
India (Sensex)	82,515.1	0.15	0.40	1.31	6.59	5.60	4.33	23.62	1.18	160,778.23
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,268.5	0.70	0.70	1.29	1.77	11.61	1.68	15.37	3.37	49.90
Kuwait Premier Index	8,982.9	0.65	1.45	2.09	3.55	14.60	1.87	16.90	3.21	41.63
Kuwait Main Index	7,042.4	0.49	0.73	1.08	-3.10	1.96	1.11	10.12	4.20	8.27
Kuwait Sector										
Banking	2,089.7	0.88	1.93	2.63	2.23	15.46	1.99	16.75	2.97	31.48
Telecom	1,051.4	0.54	0.76	1.19	0.15	3.31	1.57	10.12	7.25	3.20
Industrials	775.0	-0.49	-0.58	-0.80	4.02	7.10	1.21	15.68	4.86	2.64
Financial Services	1,509.7	-0.16	-0.16	-0.57	-0.01	-0.16	1.17	12.94	3.33	5.03
Real Estate	1,685.7	0.91	0.78	2.59	11.11	24.58	1.17	17.63	1.75	3.55
Basic Materials	917.5	0.76	0.76	-0.40	1.48	0.10	1.67	13.26	6.03	0.51
Health Care	602.0	0.00	0.64	5.21	5.51	31.36	2.03		1.74	
Consumer Staples	1,269.8	-1.70	5.75	4.15	28.64	27.14	2.70	23.54	1.99	0.39
Insurance	1,897.5	0.45	0.45	2.43	-11.05	-7.72	0.97	9.65	3.40	0.77
Consumer Discretionary	2,330.2	0.11	-0.40	-0.27	-1.29	9.77				
Energy	1,483.8	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	386.8	0.68	2.08	2.80	-4.55	-2.65				

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Kuwait

The market is up today by 0.7 %, the best performing sector today is Real estate. 0.91%.

KSA

Aramco closed at 0.48%, Sabic closed at -0.36%. STC closed at -1.16% and Al-Rajhi closed at 0.43%.

UAE

ETISALAT.AD closed at 0.23%, FAB.AD closed at -0.73%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.962	0.63	1.16	0.63	-3.62	12.73	1.88	14.86	3.47	8.40
KFH	0.771	0.78	2.25	2.80	4.74	11.62	2.21	17.83	2.64	14.23
ZAIN	0.481	0.42	1.05	0.84	0.21	2.56	1.63	9.20	7.28	2.08
BOUBYAN BANK	0.690	1.62	2.37	2.68	5.61	29.14	2.92	33.40	1.38	3.04
AGILITY	0.253	0.40	1.61	1.20	0.40	2.43	0.66	11.39	3.95	0.68
Saudi Arabia										
ARAMCO	24.92	0.48	0.48	-0.32	-6.84	-11.16	4.09	15.61	6.55	6,030.80
SABIC	55.40	0.36	0.36	-0.54	-13.03	-17.31	1.06	658.90	6.16	166.20
STC	42.50	-1.16	-1.16	1.43	-2.02	11.08	2.33	18.76	4.42	212.51
AL-RAJHI BANK	93.70	0.43	0.43	2.85	-8.14	-0.95	2.80	18.61	2.90	374.81
NCB	35.00	2.19	2.19	0.86	-2.37	4.79	1.08	9.78	5.55	210.01
Abu Dhabi										
ETISALAT.AD	17.70	0.23	2.79	3.03	4.73	8.46	3.02	11.17	4.69	153.93
FAB.AD	16.34	-0.73	0.49	1.49	18.23	18.92	1.42	10.42	4.59	180.52
EMIRATES NBD	21.95	-2.01	-0.68	-2.01	8.66	2.33	1.10	6.31	4.56	138.65
DB ISLAMIC DB	8.60	0.00	1.30	4.24	19.94	21.30	1.37	8.12	5.23	62.27
EMAR.DU	13.45	1.51	0.75	2.28	0.75	4.67	1.48	8.31	7.43	118.88
Qatar										
QNB	17.230	-0.35	1.06	1.65	7.02	-0.35	1.40	10.12	4.06	159.29
INDUSTREIS QAT	12.150	-0.25	0.00	2.53	-5.74	-8.44	2.03	17.49	6.09	73.57
QA ISLAMIC BK	22.140	-0.94	1.28	4.93	7.63	3.65	1.70	11.82	3.61	52.36
MASRAF AL RAYA	2.300	1.37	2.77	2.77	2.22	-6.62	0.87	14.63	4.35	21.41
MESAEED PETRO	1.334	-0.45	1.21	0.00	-7.23	-10.77	1.04	23.57	4.27	16.77
Oman										
BANK MUSCAT	0.275	0.36	-1.79	0.36	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.845	-0.12	0.00	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.141	-2.76	0.00	-4.08	-1.35	-8.30	0.59	12.37	4.58	0.43
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	0.221	0.45	0.45	0.45	-9.00	-6.24	0.67	7.09	6.46	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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CONTACT US

National Investments Company K.S.C.P.

P. O. Box 25667, Safat 13117

State of Kuwait - +965 2226 6608

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