



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Sunday, 15th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Crude futures jumped about \$5 per barrel on Friday after Israel launched airstrikes against Iran without U.S. support, stoking fear among investors that the conflict could spread to disrupt oil supplies in the Middle East. Oil traders viewed Israel's attack as the most significant geopolitical event since Russia launched its full-scale invasion of Ukraine, with crude prices closing at their highest level since March 2022. U.S. crude oil gained \$4.94, or 7.26%, to close at \$72.98 per barrel on Friday. Global benchmark Brent rose \$4.87, or 7.02% to settle at \$74.23 per barrel.

Kuwait Market

The market closed down by -1.35% at 8,156.6 value traded 112.8 million KD, Premier market value reached 90.4 million KD, closed down by -1.42% at 8,855.3.

KSA Market

The market closed -1.49% at 10,840.9

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,840.9	-1.49	-1.49	-1.36	-9.85	-9.93	1.97	15.30	3.93	9,141.71
Qatar (QE Index)	10,626.5	-0.81	0.65	1.56	3.85	0.52	1.25	11.85	4.56	568.62
Dubai (DFMGI)	5,364.7	-1.87	-3.09	-2.11	5.27	3.99	1.73	10.00	5.27	798.21
Abu Dhabi (ADI)	9,564.0	-1.34	-1.76	-1.25	2.08	1.54	2.01	14.55	3.04	2,715.52
Bahrain (BAX)	1,917.5	-0.16	-0.29	-0.18	-1.73	-3.44	0.83	8.44	5.27	7.45
Muscat SE INDEX	4,543.1	-1.06	-0.78	-0.39	4.03	-0.73	0.81	9.43	6.24	7.39
SP GCC Comp LMC	182.1	-0.51	-1.38	-0.75	-4.24	-3.06	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.8	-2.10	-3.48	-2.61	3.40	2.34				
Developed Markets										
MSCI World Index	3,900.9	-1.11	-0.35	0.97	7.50	5.21				
U.S. (S&P 500)	5,977.0	-1.13	-0.39	1.10	6.51	1.62	4.57	26.05	1.56	53,375.01
U.K. (FTSE 100)	8,850.6	-0.39	0.14	0.89	3.12	8.29	1.85	16.71	3.44	2,291.60
Japan (topix)	2,756.5	-0.95	-0.46	-1.61	3.68	-1.02	1.41	14.17	2.45	955,400.41
Emerging Markets										
MSCI EM Index	1,190.0	-1.06	0.60	2.82	8.05	10.65				
China (SSE Composite)	3,377.0	-0.75	-0.25	0.88	1.24	0.75	1.36	12.00		44,025.04
India (Sensex)	81,118.6	-0.70	-1.30	-0.41	4.78	3.81	4.26	23.22	1.20	158,146.49
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,156.6	-1.35	-0.04	0.54	1.02	10.78	1.67	15.25	3.39	49.54
Kuwait Premier Index	8,855.3	-1.42	0.01	0.64	2.08	12.97	1.85	16.77	3.24	41.31
Kuwait Main Index	6,971.0	-1.01	-0.29	0.06	-4.08	0.92	1.11	10.03	4.21	8.23
Kuwait Sector										
Banking	2,059.2	-1.46	0.44	1.14	0.74	13.78	1.98	16.65	2.99	31.29
Telecom	1,043.2	-0.78	-0.03	0.40	-0.64	2.50	1.57	10.10	7.27	3.19
Industrials	766.8	-1.06	-1.64	-1.85	2.92	5.96	1.19	15.43	4.94	2.60
Financial Services	1,484.3	-1.68	-1.74	-2.15	-1.59	-1.74	1.15	12.73	3.38	4.95
Real Estate	1,669.0	-0.99	-0.22	1.57	10.01	23.34	1.16	17.49	1.75	3.54
Basic Materials	910.4	-0.77	0.56	-0.59	1.28	-0.09	1.67	13.23	6.05	0.51
Health Care	601.6	-0.07	0.57	5.14	5.44	31.27	2.03		1.74	
Consumer Staples	1,239.3	-2.40	3.21	1.64	25.55	24.09	2.59	22.55	2.07	0.38
Insurance	1,903.7	0.32	0.82	2.81	-10.72	-7.37	0.97	9.69	3.39	0.77
Consumer Discretionary	2,282.0	-2.07	-2.46	-2.34	-3.33	7.50				
Energy	1,494.4	0.71	-0.55	0.88	12.79	25.67	1.21	9.84	5.20	0.30
Technology	1,076.7	-1.33	-1.33	-1.33	0.00	3.50	1.25			0.01
Utilities	381.6	-1.36	0.69	1.40	-5.84	-3.97				

NIC RESEARCH AND STUDIES DEP

Kuwait

The market is down today by -1.35%, the lowest performing sector today is consumer staples. -2.4%.

KSA

Aramco closed at 0.16%, Sabic closed at -0.36%. STC closed at -1.29% and Al-Rajhi closed at -1.17%.

UAE

ETISALAT.AD closed at -2.20%, FAB.AD closed at -1.75%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.952	-1.04	0.11	-0.42	-4.62	11.56	1.86	14.71	3.50	7.91
KFH	0.757	-1.82	0.40	0.93	2.84	9.59	2.17	17.51	2.69	13.30
ZAIN	0.478	-0.62	0.42	0.21	-0.42	1.92	1.62	9.14	7.32	1.97
BOUBYAN BANK	0.686	-0.58	1.78	2.08	5.00	28.40	2.90	33.20	1.39	2.88
AGILITY	0.251	-0.79	0.80	0.40	-0.40	1.62	0.65	11.30	3.98	0.64
Saudi Arabia										
ARAMCO	24.96	0.16	0.65	-0.16	-6.69	-11.02	4.10	15.63	6.51	6,040.32
SABIC	55.60	0.36	0.72	-0.18	-12.72	-17.01	1.07	661.27	6.12	166.80
STC	41.95	-1.29	-2.44	0.12	-3.29	9.64	2.30	18.52	4.53	209.75
AL-RAJHI BANK	92.60	-1.17	-0.75	1.65	-9.22	-2.11	2.76	18.39	2.93	370.40
NCB	35.05	0.14	2.34	1.01	-2.23	4.94	1.08	9.79	5.42	210.30
Abu Dhabi										
ETISALAT.AD	17.24	-2.20	-2.09	-1.86	-0.24	3.31	2.88	10.64	4.92	146.63
FAB.AD	15.96	-1.75	-3.57	-2.61	13.46	14.12	1.36	10.00	4.78	173.23
EMIRATES NBD	21.20	-2.08	-4.07	-5.36	4.95	-1.17	1.06	6.10	4.72	133.91
DB ISLAMIC DB	8.40	-1.06	-1.06	1.82	17.15	18.48	1.34	7.93	5.36	60.82
EMAR.DU	12.55	-3.46	-5.99	-4.56	-5.99	-2.33	1.38	7.76	7.97	110.93
Qatar										
QNB	17.230	0.00	1.06	1.65	7.02	-0.35	1.40	10.12	4.06	159.14
INDUSTREIS QAT	11.980	-1.40	-1.40	1.10	-7.06	-9.72	2.01	17.25	6.18	72.48
QA ISLAMIC BK	22.170	0.14	1.42	5.07	7.78	3.79	1.70	11.84	3.61	52.39
MASRAF AL RAYA	2.283	-0.74	2.01	2.01	1.47	-7.31	0.86	14.52	4.38	21.23
MESAEED PETRO	1.310	-1.80	-0.61	-1.80	-8.90	-12.37	1.02	23.15	4.35	16.46
Oman										
BANK MUSCAT	0.275	0.00	-1.79	0.36	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.840	-0.59	-0.59	-0.47	-1.18	-10.64	0.98	7.87	6.55	0.63
BANK DHOFAR	0.136	-3.55	-3.55	-7.48	-4.85	-11.56	0.57	11.93	4.75	0.41
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	0.45	0.45	0.45	-9.00	-6.24	0.67	7.06	6.49	0.20

* 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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

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