



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Monday, 16th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices climbed on Monday, extending Friday's rally, as renewed strikes by Israel and Iran over the weekend increased concerns that the battle could widen across the region and significantly disrupt oil exports from the Middle East. Brent crude futures rose \$1.12, or 1.5%, to \$75.35 a barrel by 0019 GMT, while U.S. West Texas Intermediate crude futures gained \$1.10, or 1.5%, to \$74.08. They had surged more than \$4 earlier in the session.

Kuwait Market

The market closed down by -3.84% at 7,843.4 value traded 127.6 million KD, Premier market value reached 107.2 million KD, closed down by -3.93% at 8,507.2.

KSA Market

The market closed -1.01% at 10,731.6

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,731.6	-1.01	-1.01	-2.35	-10.76	-10.84	1.94	15.09	3.98	9,197.77
Qatar (QE Index)	10,286.9	-3.20	-3.20	-1.68	0.53	-2.69	1.21	11.46	4.72	548.20
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)	1,902.1	-0.81	-0.81	-0.98	-2.53	-4.22	0.83	8.37	5.30	7.39
Muscat SE INDEX	4,503.7	-0.87	-0.87	-1.26	3.13	-1.59	0.80	9.36	6.29	7.34
SP GCC Comp LMC	179.7	-1.34	-1.34	-2.08	-5.52	-4.36	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.8	0.00	0.00	-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	7,843.4	-3.84	-3.84	-3.32	-2.86	6.53	1.67	15.25	3.39	49.54
Kuwait Premier Index	8,507.2	-3.93	-3.93	-3.32	-1.93	8.53	1.85	16.77	3.24	41.31
Kuwait Main Index	6,736.0	-3.37	-3.37	-3.32	-7.31	-2.48	1.11	10.03	4.21	8.23
Kuwait Sector										
Banking	1,979.3	-3.88	-3.88	-2.79	-3.17	9.37	1.98	16.65	2.99	31.29
Telecom	1,017.7	-2.44	-2.44	-2.05	-3.07	0.00	1.57	10.10	7.27	3.19
Industrials	734.3	-4.23	-4.23	-6.01	-1.44	1.47	1.19	15.43	4.94	2.60
Financial Services	1,411.1	-4.94	-4.94	-6.98	-6.45	-6.59	1.15	12.73	3.38	4.95
Real Estate	1,616.5	-3.14	-3.14	-1.62	6.56	19.47	1.16	17.49	1.75	3.54
Basic Materials	884.5	-2.84	-2.84	-3.41	-1.60	-2.93	1.67	13.23	6.05	0.51
Health Care	606.1	0.75	0.75	5.92	6.22	32.25	2.03		1.74	
Consumer Staples	1,218.1	-1.71	-1.71	-0.09	23.41	21.97	2.59	22.55	2.07	0.38
Insurance	1,898.6	-0.27	-0.27	2.54	-10.96	-7.62	0.97	9.69	3.39	0.77
Consumer Discretionary	2,122.3	-7.00	-7.00	-9.17	-10.09	-0.02				
Energy	1,448.9	-3.04	-3.04	-2.19	9.36	21.85	1.21	9.84	5.20	0.30
Technology	1,004.0	-6.76	-6.76	-8.00	-6.76	-3.50	1.25			0.01
Utilities	365.8	-4.14	-4.14	-2.80	-9.74	-7.95				

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Kuwait
The market is down today by -3.84%, the lowest performing sector today is consumer discretionary. -7.0%.

KSA
Aramco closed at 1.76%, Sabic closed at -2.34%. STC closed at -0.36% and Al-Rajhi closed at -1.51%.

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	0.916	-3.78	-3.78	-4.18	-8.23	7.34	1.79	14.15	3.64	8.10
KFH	0.729	-3.70	-3.70	-2.80	-0.97	5.54	2.09	16.86	2.79	13.51
ZAIN	0.465	-2.72	-2.72	-2.52	-3.13	-0.85	1.58	8.89	7.53	2.01
BOUBYAN BANK	0.671	-2.19	-2.19	-0.15	2.70	25.59	2.84	32.48	1.42	2.96
AGILITY	0.239	-4.78	-4.78	-4.40	-5.16	-3.24	0.62	10.76	4.18	0.64
Saudi Arabia										
ARAMCO	25.40	1.76	1.76	1.60	-5.05	-9.45	4.17	15.91	6.40	6,151.23
SABIC	54.30	-2.34	-2.34	-2.51	-14.76	-18.96	1.04	645.81	6.26	163.02
STC	41.80	-0.36	-0.36	-0.24	-3.64	9.25	2.29	18.45	4.55	209.15
AL-RAJHI BANK	91.20	-1.51	-1.51	0.11	-10.59	-3.59	2.72	18.11	2.97	365.06
NCB	33.95	-3.14	-3.14	-2.16	-5.30	1.65	1.04	9.49	5.60	203.85
Abu Dhabi										
ETISALAT.AD	16.86	-2.20	-2.09	-1.86	-0.24	3.31	2.88	10.64	4.92	146.63
FAB.AD	15.68	-1.75	-3.57	-2.61	13.46	14.12	1.36	10.00	4.78	173.01
EMIRATES NBD	21.20	-2.08	-4.07	-5.36	4.95	-1.17	1.06	6.10	4.72	133.28
DB ISLAMIC DB	8.40	-1.06	-1.06	1.82	17.15	18.48	1.34	7.93	5.36	60.10
EMAR.DU	12.55	-3.46	-5.99	-4.56	-5.99	-2.33	1.38	7.76	7.97	110.93
Qatar										
QNB	16.510	-4.18	-4.18	-2.60	2.55	-4.51	1.34	9.70	4.24	152.77
INDUSTREIS QAT	11.680	-2.50	-2.50	-1.43	-9.39	-11.98	1.96	16.81	6.34	70.66
QA ISLAMIC BK	21.680	-2.21	-2.21	2.75	5.40	1.50	1.66	11.58	3.69	51.23
MASRAF AL RAYA	2.221	-2.72	-2.72	-0.76	-1.29	-9.83	0.84	14.12	4.50	20.65
MESAIEED PETRO	1.245	-4.96	-4.96	-6.67	-13.42	-16.72	0.97	22.00	4.58	15.70
Oman										
BANK MUSCAT	0.273	-0.73	-0.73	-0.36	7.91	8.33	0.86	9.93	6.04	2.03
OMANTEL	0.845	0.60	0.60	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.136	0.00	0.00	-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	0.219	-0.45	-0.45	-0.45	-9.82	-7.09	0.66	7.02	6.52	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

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