



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Tuesday, 17th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Brent rose to 73.67 USD/Bbl on June 17, 2025, up 0.60% from the previous day. as Israel vowed more strikes on Iran, keeping the market on edge about a potential escalation that could disrupt energy flows and vital trade routes. US President Donald Trump on Monday called for the evacuation of Tehran after Israel intensifies airstrikes on Iran's capital, including a hit on state media buildings. The attacks came even as reports indicated Iran has been urgently signaling that it seeks an end to hostilities and a resumption of negotiations over its nuclear program.

Kuwait Market

The market closed up by 1.46% at 7,958.0 value, traded 103.2 million KD, Premier market value reached 78.2 million KD, closed up by 1.4% at 8,626.4.

KSA Market

The market closed +1.26% at 10,867.0

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,867.0	1.26	0.24	-1.12	-9.63	-9.72	1.97	15.31	3.93	9,222.65
Qatar (QE Index)	10,464.8	1.73	-1.52	0.02	2.27	-1.01	1.23	11.66	4.63	559.43
Dubai (DFMGI)	5,407.0	0.79	0.79	-1.34	6.10	4.81	1.74	10.06	5.24	803.95
Abu Dhabi (ADI)	9,584.9	0.22	0.22	-1.04	2.31	1.76	2.02	14.58	3.04	2,725.65
Bahrain (BAX)	1,904.4	0.12	-0.68	-0.86	-2.41	-4.10	0.83	8.37	5.30	7.40
Muscat SE INDEX	4,535.2	0.70	-0.17	-0.57	3.85	-0.91	0.81	9.42	6.25	7.39
SP GCC Comp LMC	181.6	1.08	-0.28	-1.02	-4.50	-3.33	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	156.4	0.36	0.36	-2.26	3.77	2.71				
Developed Markets										
MSCI World Index	3,936.0	0.90	0.90	1.88	8.47	6.15				
U.S. (S&P 500)	6,033.1	0.94	0.94	2.05	7.51	2.58	4.57	26.05	1.56	53,375.03
U.K. (FTSE 100)	8,875.2	0.28	0.28	1.17	3.41	8.59	1.85	16.75	3.43	2,297.71
Japan (topix)	2,777.1	0.75	0.75	-0.87	4.45	-0.28	1.42	14.28	2.43	962,282.86
Emerging Markets										
MSCI EM Index	1,198.2	0.68	0.68	3.53	8.79	11.41				
China (SSE Composite)	3,388.7	0.35	0.35	1.23	1.59	1.10	1.36	12.00		44,025.04
India (Sensex)	81,796.2	0.84	0.84	0.42	5.66	4.68	4.36	23.67	1.18	159,444.64
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,958.0	1.46	-2.43	-1.90	-1.44	8.09	1.61	14.65	3.53	47.63
Kuwait Premier Index	8,626.4	1.40	-2.59	-1.96	-0.56	10.05	1.78	16.11	3.37	39.68
Kuwait Main Index	6,855.1	1.77	-1.66	-1.61	-5.68	-0.75	1.07	9.64	4.35	7.95
Kuwait Sector										
Banking	2,009.7	1.53	-2.40	-1.29	-1.68	11.04	1.90	16.00	3.11	30.08
Telecom	1,025.9	0.81	-1.66	-1.26	-2.28	0.80	1.53	9.85	7.45	3.11
Industrials	743.8	1.30	-2.99	-4.79	-0.17	2.79	1.14	14.79	5.16	2.49
Financial Services	1,432.1	1.49	-3.52	-5.59	-5.06	-5.20	1.10	12.07	3.55	4.71
Real Estate	1,646.2	1.83	-1.36	0.18	8.51	21.66	1.13	16.76	1.81	3.43
Basic Materials	857.2	-3.09	-5.84	-6.39	-4.63	-5.93	1.62	12.85	6.22	0.50
Health Care	627.4	3.51	4.28	9.64	9.95	36.89	2.05		1.73	
Consumer Staples	1,235.3	1.41	-0.32	1.32	25.15	23.69	2.55	22.13	2.11	0.37
Insurance	1,847.2	-2.71	-2.97	-0.24	-13.37	-10.12	0.97	9.67	3.40	0.77
Consumer Discretionary	2,200.0	3.66	-3.59	-5.85	-6.80	3.64				
Energy	1,508.9	4.14	0.97	1.86	13.88	26.89	1.17	9.58	5.36	0.30
Technology	1,025.8	2.17	-4.73	-6.00	-4.73	-1.40	1.17			0.01
Utilities	368.4	0.72	-3.45	-2.10	-9.09	-7.29				

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Kuwait

The market is up today by 1.46%, the best performing sector today is Energy 4.14%.

KSA

Aramco closed at -0.39%, Sabic closed at -2.76%. STC closed at 1.2% and Al-Rajhi closed at 1.54%.

UAE

ETISALAT.AD closed at -0.24%, FAB.AD closed at -0.51%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.930	1.53	-2.31	-2.72	-6.82	8.98	1.82	14.37	3.58	8.14
KFH	0.739	1.37	-2.38	-1.47	0.39	6.99	2.12	17.09	2.76	13.66
ZAIN	0.469	0.86	-1.88	-1.68	-2.29	0.00	1.59	8.97	7.46	2.03
BOUBYAN BANK	0.675	0.60	-1.60	0.45	3.32	26.34	2.85	32.67	1.41	2.98
AGILITY	0.245	2.51	-2.39	-2.00	-2.78	-0.81	0.64	11.03	4.08	0.66
Saudi Arabia										
ARAMCO	25.30	-0.39	1.36	1.20	-5.42	-9.80	4.15	15.84	6.42	6,120.32
SABIC	55.80	2.76	0.36	0.18	-12.40	-16.72	1.07	663.65	6.09	167.34
STC	42.30	1.20	0.83	0.95	-2.49	10.56	2.32	18.67	4.49	211.42
AL-RAJHI BANK	92.60	1.54	0.00	1.65	-9.22	-2.11	2.76	18.39	2.93	370.26
NCB	34.30	1.03	-2.14	-1.15	-4.32	2.69	1.05	9.58	5.54	205.72
Abu Dhabi										
ETISALAT.AD	16.82	-0.24	-0.24	-2.10	-0.47	3.06	2.87	10.62	4.93	146.26
FAB.AD	15.60	-0.51	-0.51	-3.11	12.88	13.54	1.35	9.95	4.81	172.31
EMIRATES NBD	21.25	0.24	0.24	-5.13	5.20	-0.93	1.06	6.11	4.71	134.21
DB ISLAMIC DB	8.39	-0.12	-0.12	1.70	17.02	18.34	1.33	7.92	5.36	60.74
EMAR.DU	12.50	-0.40	-0.40	-4.94	-6.37	-2.72	1.38	7.73	8.00	110.47
Qatar										
QNB	16.930	2.54	-1.74	-0.12	5.16	-2.08	1.37	9.95	4.13	156.05
INDUSTREIS QAT	11.790	0.94	-1.59	-0.51	-8.53	-11.15	1.97	16.97	6.28	71.18
QA ISLAMIC BK	21.800	0.55	-1.67	3.32	5.98	2.06	1.67	11.64	3.67	51.41
MASRAF AL RAYA	2.260	1.76	-1.01	0.98	0.44	-8.24	0.85	14.37	4.42	20.97
MESAIEED PETRO	1.270	2.01	-3.05	-4.80	-11.68	-15.05	0.99	22.44	4.49	15.92
Oman										
BANK MUSCAT	0.276	1.10	0.36	0.73	9.09	9.52	0.87	10.04	5.98	2.07
OMANTEL	0.844	-0.12	0.48	0.00	-0.71	-10.21	0.99	7.91	6.52	0.63
BANK DHOFAR	0.140	2.94	2.94	-4.76	-2.05	-8.96	0.59	12.28	4.61	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	0.219	0.00	-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
04-June. 25	26.84%	13.91%	0.02%	6.56%	9.40%	18.03%	14.05%	6.90%	7.37%
11-June. 25	26.83%	13.96%	0.08%	6.69%	9.35%	18.05%	14.06%	6.89%	7.37%

End of Report

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