



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Wednesday, 18th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices ticked up in early trading on Wednesday after ending the previous session up more than 4% on worries that the Iran-Israel conflict could disrupt supplies. Brent crude futures rose 19 cents, or 0.25%, to \$76.64 a barrel by 0029 GMT. U.S. West Texas Intermediate crude futures rose 23 cents, or 0.31%, to \$75.07 per barrel.

Kuwait Market

The market closed up by 0.65% at 8,010.1 value traded 107.7 million KD, Premier market value reached 82.8 million KD, closed down by 0.62% at 8,679.7.

KSA Market

The market closed -1.41% at 10,713.8

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,713.8	-1.41	-1.17	-2.52	-10.90	-10.99	1.95	15.12	3.98	9,097.64
Qatar (QE Index)	10,411.4	-0.51	-2.02	-0.49	1.74	-1.51	1.23	11.60	4.66	556.95
Dubai (DFMGI)	5,372.4	-0.64	0.14	-1.97	5.42	4.14	1.73	10.00	5.26	799.44
Abu Dhabi (ADI)	9,536.4	-0.51	-0.29	-1.54	1.79	1.25	2.01	14.49	3.05	2,705.35
Bahrain (BAX)	1,910.2	0.30	-0.38	-0.56	-2.11	-3.81	0.83	8.40	5.29	7.42
Muscat SE INDEX	4,520.4	-0.33	-0.50	-0.89	3.51	-1.23	0.80	9.38	6.27	7.36
SP GCC Comp LMC	180.1	-0.85	-1.12	-1.87	-5.31	-4.15	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	155.3	-0.68	-0.32	-2.92	3.07	2.02				
Developed Markets										
MSCI World Index	3,901.8	-0.87	0.02	0.99	7.53	5.23				
U.S. (S&P 500)	5,982.7	-0.84	0.10	1.20	6.61	1.72	4.61	26.30	1.55	53,872.96
U.K. (FTSE 100)	8,834.0	-0.46	-0.19	0.70	2.93	8.09	1.83	16.68	3.44	2,286.54
Japan (topix)	2,787.0	0.35	1.11	-0.52	4.82	0.07	1.42	14.33	2.42	965,423.08
Emerging Markets										
MSCI EM Index	1,197.0	-0.10	0.58	3.42	8.68	11.30				
China (SSE Composite)	3,387.4	-0.04	0.31	1.19	1.55	1.06	1.36	12.00		44,025.04
India (Sensex)	81,583.3	-0.26	0.57	0.16	5.38	4.41	4.35	23.60	1.19	159,002.36
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,010.1	0.65	-1.80	-1.26	-0.79	8.80	1.63	14.85	3.48	48.33
Kuwait Premier Index	8,679.7	0.62	-1.98	-1.36	0.06	10.73	1.81	16.33	3.33	40.24
Kuwait Main Index	6,912.9	0.84	-0.83	-0.78	-4.88	0.08	1.09	9.76	4.28	8.09
Kuwait Sector										
Banking	2,017.2	0.37	-2.04	-0.92	-1.32	11.46	1.93	16.25	3.06	30.54
Telecom	1,033.7	0.76	-0.91	-0.51	-1.54	1.57	1.54	9.93	7.39	3.14
Industrials	746.6	0.37	-2.63	-4.44	0.21	3.17	1.15	14.97	5.09	2.52
Financial Services	1,461.4	2.05	-1.54	-3.66	-3.11	-3.25	1.11	12.26	3.50	4.78
Real Estate	1,652.3	0.37	-1.00	0.55	8.91	22.11	1.15	16.93	1.78	3.50
Basic Materials	850.0	-0.84	-6.63	-7.18	-5.44	-6.72	1.57	12.46	6.42	0.48
Health Care	658.9	5.02	9.51	15.14	15.47	43.76	2.12		1.67	
Consumer Staples	1,233.8	-0.12	-0.44	1.20	25.00	23.54	2.58	22.49	2.08	0.37
Insurance	1,848.9	0.09	-2.88	-0.14	-13.29	-10.04	0.94	9.40	3.50	0.75
Consumer Discretionary	2,276.2	3.47	-0.25	-2.59	-3.57	7.23				
Energy	1,477.9	-2.06	-1.11	-0.24	11.54	24.28	1.22	9.96	5.15	0.31
Technology	1,054.9	2.84	-2.03	-3.33	-2.03	1.40	1.19			0.01
Utilities	371.1	0.71	-2.76	-1.40	-8.44	-6.62				

NIC RESEARCH AND STUDIES DEP

Kuwait

The market is up today by 0.65%, the best performing sector today is Health Care 5.02%.

KSA

Aramco closed at -1.26%, Sabic closed at -0.72%. STC closed at -1.42% and Al-Rajhi closed at -0.97%.

UAE

ETISALAT.AD closed at -0.36%, FAB.AD closed at -0.64%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.933	0.32	-2.00	-2.41	-6.52	9.34	1.83	14.42	3.57	8.16
KFH	0.742	0.41	-1.98	-1.07	0.80	7.42	2.13	17.16	2.75	13.71
ZAIN	0.473	0.85	-1.05	-0.84	-1.46	0.85	1.60	9.05	7.40	2.05
BOUBYAN BANK	0.672	-0.44	-2.04	0.00	2.86	25.78	2.84	32.53	1.42	2.96
AGILITY	0.247	0.82	-1.59	-1.20	-1.98	0.00	0.64	11.12	4.05	0.66
Saudi Arabia										
ARAMCO	24.98	-1.26	0.08	-0.08	-6.62	-10.94	4.10	15.64	6.51	6,045.32
SABIC	55.40	-0.72	-0.36	-0.54	-13.03	-17.31	1.06	658.90	6.14	166.20
STC	41.70	-1.42	-0.60	-0.48	-3.87	8.99	2.28	18.41	4.56	208.51
AL-RAJHI BANK	91.70	-0.97	-0.97	0.66	-10.10	-3.07	2.74	18.21	2.96	366.81
NCB	34.50	0.58	-1.57	-0.58	-3.77	3.29	1.06	9.64	5.51	207.01
Abu Dhabi										
ETISALAT.AD	16.76	-0.36	-0.59	-2.44	-0.83	2.70	2.86	10.58	4.95	145.76
FAB.AD	15.50	-0.64	-1.15	-3.73	12.16	12.81	1.34	9.88	4.84	171.24
EMIRATES NBD	21.00	-1.18	-0.94	-6.25	3.96	-2.10	1.05	6.04	4.76	132.65
DB ISLAMIC DB	8.40	0.12	0.00	1.82	17.15	18.48	1.34	7.93	5.36	60.82
EMAR.DU	12.55	0.40	0.00	-4.56	-5.99	-2.33	1.38	7.76	7.97	110.93
Qatar										
QNB	16.800	-0.77	-2.50	-0.88	4.35	-2.83	1.36	9.87	4.17	155.16
INDUSTREIS QAT	12.120	2.80	1.17	2.28	-5.97	-8.67	2.03	17.45	6.11	73.32
QA ISLAMIC BK	21.600	-0.92	-2.57	2.37	5.01	1.12	1.65	11.54	3.70	51.04
MASRAF AL RAYA	2.222	-1.68	-2.67	-0.71	-1.24	-9.78	0.84	14.13	4.50	20.66
MESAIEED PETRO	1.281	0.87	-2.21	-3.97	-10.92	-14.31	1.00	22.64	4.45	16.09
Oman										
BANK MUSCAT	0.273	-1.09	-0.73	-0.36	7.91	8.33	0.86	9.93	6.04	2.05
OMANTEL	0.845	0.12	0.60	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.135	-3.57	-0.74	-8.16	-5.55	-12.21	0.56	11.84	4.78	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	0.46	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
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

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