



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Thursday, 19th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Crude oil futures were little changed on Wednesday, after President Donald Trump said Iran wants to negotiate over its nuclear program in the wake of six days of Israeli airstrikes. U.S. crude oil futures rose 30 cents, or 0.4%, to close at \$75.14 a barrel, while global benchmark Brent gained 25 cents, or 0.25%, to settle at \$76.70 per barrel. Prices had jumped more than 4% on Tuesday after Trump called for Iran's unconditional surrender.

Kuwait Market

The market closed down by -1.46% at 7,893.4 value traded 111.9 million KD, Premier market value reached 83.0 million KD, closed down by -1.56% at 8,543.8.

KSA Market

The market closed -1.15% at 10,591.1

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,591.1	-1.15	-2.30	-3.63	-11.92	-12.01	1.93	14.95	4.02	9,037.87
Qatar (QE Index)	10,347.9	-0.61	-2.62	-1.10	1.12	-2.11	1.22	11.54	4.68	554.04
Dubai (DFMGI)	5,306.3	-1.23	-1.09	-3.18	4.12	2.86	1.71	9.89	5.32	790.99
Abu Dhabi (ADI)	9,496.3	-0.42	-0.71	-1.95	1.36	0.82	2.00	14.41	3.07	2,691.47
Bahrain (BAX)	1,888.7	-1.12	-1.50	-1.67	-3.21	-4.89	0.82	8.25	5.37	7.34
Muscat SE INDEX	4,520.5	0.00	-0.50	-0.89	3.51	-1.23	0.80	9.39	6.27	7.36
SP GCC Comp LMC	178.5	-0.91	-2.02	-2.75	-6.17	-5.02	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	153.9	-0.90	-1.21	-3.80	2.14	1.10				
Developed Markets										
MSCI World Index	3,899.5	-0.06	-0.04	0.93	7.46	5.17				
U.S. (S&P 500)	5,980.9	-0.03	0.07	1.17	6.58	1.69	4.57	26.07	1.56	53,418.37
U.K. (FTSE 100)	8,843.5	0.11	-0.08	0.81	3.04	8.20	1.83	16.70	3.44	2,289.04
Japan (topix)	2,808.4	0.77	1.88	0.24	5.63	0.84	1.44	14.44	2.40	972,642.82
Emerging Markets										
MSCI EM Index	1,193.5	-0.29	0.29	3.12	8.36	10.97				
China (SSE Composite)	3,388.8	0.04	0.35	1.23	1.59	1.11	1.36	12.00		44,025.04
India (Sensex)	81,444.7	-0.17	0.40	-0.01	5.21	4.23	4.34	23.56	1.19	158,600.65
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,893.4	-1.46	-3.23	-2.70	-2.24	7.21	1.64	14.94	3.46	48.65
Kuwait Premier Index	8,543.8	-1.56	-3.52	-2.90	-1.51	8.99	1.82	16.43	3.31	40.49
Kuwait Main Index	6,849.7	-0.91	-1.74	-1.68	-5.75	-0.83	1.10	9.83	4.24	8.16
Kuwait Sector										
Banking	1,991.5	-1.27	-3.29	-2.19	-2.58	10.04	1.94	16.31	3.05	30.66
Telecom	1,020.6	-1.27	-2.17	-1.77	-2.79	0.28	1.55	10.01	7.34	3.16
Industrials	714.2	-4.33	-6.85	-8.58	-4.14	-1.30	1.16	15.03	5.07	2.53
Financial Services	1,449.2	-0.84	-2.37	-4.47	-3.92	-4.07	1.14	12.52	3.42	4.88
Real Estate	1,632.0	-1.22	-2.21	-0.68	7.58	20.61	1.15	16.98	1.78	3.51
Basic Materials	822.3	-3.26	-9.67	-10.20	-8.52	-9.76	1.56	12.35	6.47	0.48
Health Care	642.6	-2.47	6.81	12.30	12.62	40.21	2.22		1.59	
Consumer Staples	1,214.8	-1.54	-1.98	-0.36	23.07	21.64	2.58	22.45	2.08	0.37
Insurance	1,835.6	-0.72	-3.58	-0.86	-13.91	-10.69	0.94	9.41	3.49	0.75
Consumer Discretionary	2,201.8	-3.27	-3.51	-5.77	-6.73	3.72				
Energy	1,489.3	0.78	-0.34	0.54	12.41	25.24	1.19	9.74	5.26	0.30
Technology	989.4	-6.21	-8.11	-9.33	-8.11	-4.89	1.23			0.01
Utilities	368.4	-0.71	-3.45	-2.10	-9.09	-7.29				

NIC RESEARCH AND STUDIES DEP

Kuwait

The market is down today by -1.46%, the lowest performing sector today is technology at -6.21%.

KSA

Aramco closed at -0.32%, Sabic closed at -0.18%. STC closed at 0.12% and Al-Rajhi closed at -0.22%.

UAE

ETISALAT.AD closed at -1.55%, FAB.AD closed at -0.26%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.917	-1.71	-3.68	-4.08	-8.13	7.46	1.79	14.17	3.64	8.02
KFH	0.734	-1.08	-3.04	-2.13	-0.29	6.26	2.11	16.98	2.78	13.56
ZAIN	0.465	-1.69	-2.72	-2.52	-3.13	-0.85	1.58	8.89	7.53	2.01
BOUBYAN BANK	0.668	-0.60	-2.62	-0.60	2.24	25.03	2.83	32.33	1.43	2.95
AGILITY	0.209	-15.38	-16.73	-16.40	-17.06	-15.38	0.54	9.41	4.78	0.56
Saudi Arabia										
ARAMCO	24.90	-0.32	-0.24	-0.40	-6.92	-11.23	4.09	15.59	6.53	6,025.80
SABIC	55.30	-0.18	-0.54	-0.72	-13.19	-17.46	1.06	657.71	6.15	165.90
STC	41.75	0.12	-0.48	-0.36	-3.75	9.12	2.29	18.43	4.55	208.75
AL-RAJHI BANK	91.50	-0.22	-1.19	0.44	-10.29	-3.28	2.73	18.17	2.96	366.00
NCB	34.35	-0.43	-2.00	-1.01	-4.18	2.84	1.06	9.60	5.53	206.10
Abu Dhabi										
ETISALAT.AD	16.50	-1.55	-2.14	-3.96	-2.37	1.10	2.82	10.42	5.03	143.50
FAB.AD	15.46	-0.26	-1.40	-3.98	11.87	12.52	1.34	9.86	4.85	170.80
EMIRATES NBD	20.85	-0.71	-1.65	-6.92	3.22	-2.80	1.04	5.99	4.80	131.70
DB ISLAMIC DB	8.39	-0.12	-0.12	1.70	17.02	18.34	1.33	7.92	5.36	60.75
EMAR.DU	12.40	-1.20	-1.20	-5.70	-7.12	-3.50	1.37	7.66	8.06	109.60
Qatar										
QNB	16.820	0.12	-2.38	-0.77	4.47	-2.72	1.36	9.88	4.16	155.36
INDUSTREIS QAT	12.150	0.25	1.42	2.53	-5.74	-8.44	2.03	17.49	6.09	73.51
QA ISLAMIC BK	21.580	-0.09	-2.66	2.27	4.91	1.03	1.65	11.53	3.71	50.99
MASRAF AL RAYA	2.206	-0.72	-3.37	-1.43	-1.96	-10.43	0.83	14.03	4.53	20.52
MESAIIEED PETRO	1.300	1.48	-0.76	-2.55	-9.60	-13.04	1.01	22.97	4.38	16.33
Oman										
BANK MUSCAT	0.274	0.37	-0.36	0.00	8.30	8.73	0.86	9.97	6.02	2.06
OMANTEL	0.844	-0.12	0.48	0.00	-0.71	-10.21	0.99	7.91	6.52	0.63
BANK DHOFAR	0.135	0.00	-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	0.219	-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
11-June. 25	26.83%	13.96%	0.08%	6.69%	9.35%	18.05%	14.06%	6.89%	7.37%
18-June. 25	26.96%	14.09%	0.08%	6.70%	11.50%	18.11%	14.20%	6.98%	7.61%

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