



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Monday, 2nd June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices rebounded more than \$1 a barrel on Monday after OPEC+ decided to increase output in July by the same amount as it did in each of the prior two months, in line with market expectations. Brent crude futures climbed \$1.19, or 1.9%, to \$63.97 a barrel by 0044 GMT after settling 0.9% lower on Friday. U.S. West Texas Intermediate crude was at \$62.09 a barrel, up \$1.30, or 2.14%, following a 0.3% decline in the previous session. Both contracts were down more than 1% for the week.

Kuwait Market

The market closed up by 0.42% at 8,146.8 value traded 93.6 million KD, Premier market value reached 44.2 million KD, closed up by 0.37% at 8,831.9.

KSA Market

The market closed down by -1.50% at 10,825.3

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,825.3	-1.50	-1.50	-1.50	-9.98	-10.06	1.97	15.23	3.96	9,110.33
Qatar (QE Index)	10,501.3	0.37	0.37	0.37	2.62	-0.66	1.24	11.72	4.61	563.68
Dubai (DFMGI)	5,480.5	-0.22	0.30	3.27	7.54	6.24	1.77	10.20	5.15	816.29
Abu Dhabi (ADI)	9,685.1	-0.62	0.20	1.58	3.38	2.83	2.05	14.79	2.99	2,732.77
Bahrain (BAX)	1,918.7	-0.11	-0.11	-0.11	-1.67	-3.38	0.83	8.44	5.26	7.45
Muscat SE INDEX	4,565.2	0.09	0.09	0.09	4.54	-0.25	0.81	9.44	6.24	7.40
SP GCC Comp LMC	181.8	-0.91	-0.91	-0.91	-4.39	-3.22	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.0	0.00	0.00	0.00	6.17	5.09				
Developed Markets										
MSCI World Index	3,863.5	0.03	1.60	5.69	6.47	4.20				
U.S. (S&P 500)	5,911.7	-0.01	1.88	6.15	5.34	0.51	4.52	25.84	1.57	52,756.93
U.K. (FTSE 100)	8,772.4	0.64	0.62	3.27	2.21	7.33	1.83	16.59	3.44	2,279.16
Japan (topix)	2,801.6	-0.37	2.41	5.03	5.37	0.60	1.43	14.40	2.41	970,802.17
Emerging Markets										
MSCI EM Index	1,157.3	-1.10	-1.16	4.00	5.08	7.61				
China (SSE Composite)	3,347.5	-0.47	-0.03	2.09	0.35	-0.13	1.36	12.00		44,025.04
India (Sensex)	81,451.0	-0.22	-0.33	1.51	5.21	4.24	4.38	23.31	1.19	158,682.97
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,146.8	0.42	0.42	0.42	0.90	10.65	1.66	15.18	3.44	49.26
Kuwait Premier Index	8,831.9	0.37	0.37	0.37	1.81	12.67	1.84	16.66	3.29	41.04
Kuwait Main Index	7,014.2	0.68	0.68	0.68	-3.49	1.55	1.11	10.10	4.22	8.22
Kuwait Sector										
Banking	2,044.7	0.43	0.43	0.43	0.03	12.98	1.96	16.46	3.02	30.94
Telecom	1,042.7	0.36	0.36	0.36	-0.68	2.46	1.56	10.06	7.30	3.18
Industrials	780.9	-0.04	-0.04	-0.04	4.82	7.92	1.21	15.72	4.85	2.65
Financial Services	1,522.5	0.37	0.37	0.37	0.94	0.79	1.18	13.04	3.31	5.06
Real Estate	1,655.8	0.76	0.76	0.76	9.14	22.37	1.15	17.45	1.79	3.49
Basic Materials	906.6	-1.01	-1.01	-1.01	0.86	-0.51	1.68	13.31	8.08	0.52
Health Care	600.8	5.00	5.00	5.00	5.30	31.10	1.93		1.83	
Consumer Staples	1,243.9	2.02	2.02	2.02	26.02	24.55	2.55	22.11	2.11	0.37
Insurance	1,854.3	0.15	0.15	0.15	-13.03	-9.78	0.94	9.42	3.49	0.75
Consumer Discretionary	2,327.4	-0.39	-0.39	-0.39	-1.40	9.64				
Energy	1,519.9	2.60	2.60	2.60	14.72	27.82	1.20	9.74	5.25	0.30
Technology	1,127.6	3.33	3.33	3.33	4.73	8.39	1.27			0.02
Utilities	381.6	1.40	1.40	1.40	-5.84	-3.97				

NIC RESEARCH AND STUDIES DEP

Kuwait

The market is up today by 0.42%, the best performing sector today is health care 5.0%.

KSA

Aramco closed at -0.72%, Sabic closed at -1.44%. STC closed at 0.12% and Al-Rajhi closed at -2.41%.

UAE

ETISALAT.AD closed at -0.35%, FAB.AD closed at -3.13%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.955	-0.10	-0.10	-0.10	-4.32	11.91	1.87	14.76	3.49	8.35
KFH	0.754	0.53	0.53	0.53	2.43	9.16	2.16	17.44	2.70	13.93
ZAIN	0.477	0.00	0.00	0.00	-0.62	1.71	1.62	9.12	7.34	2.06
BOUBYAN BANK	0.673	0.15	0.15	0.15	3.01	25.96	2.85	32.58	1.42	2.97
AGILITY	0.252	0.80	0.80	0.80	0.00	2.02	0.65	11.34	3.97	0.67
Saudi Arabia										
ARAMCO	24.82	-0.72	-0.72	-0.72	-7.21	-11.52	4.07	15.54	6.55	6,004.84
SABIC	54.90	-1.44	-1.44	-1.44	-13.81	-18.06	1.06	652.95	6.19	164.66
STC	41.95	0.12	0.12	0.12	-3.29	9.64	2.30	18.52	4.53	209.69
AL-RAJHI BANK	88.90	-2.41	-2.41	-2.41	-12.84	-6.03	2.65	17.66	3.05	355.51
NCB	33.85	-2.45	-2.45	-2.45	-5.58	1.35	1.04	9.46	5.61	203.05
Abu Dhabi										
ETISALAT.AD	17.18	-0.35	-0.58	-1.26	1.66	5.27	2.93	10.84	4.83	149.41
FAB.AD	16.10	-3.13	0.50	7.19	16.50	17.18	1.40	10.27	4.66	177.87
EMIRATES NBD	22.40	-2.40	-2.61	9.00	10.89	4.43	1.12	6.44	4.46	141.49
DB ISLAMIC DB	8.25	-0.12	3.25	9.13	15.06	16.36	1.31	7.79	5.45	59.74
EMAR.DU	13.15	-1.13	-2.95	0.38	-1.50	2.33	1.45	8.13	7.60	116.23
Qatar										
QNB	17.140	1.12	1.12	1.12	6.46	-0.87	1.39	10.07	4.08	158.70
INDUSTREIS QAT	11.970	1.01	1.01	1.01	-7.14	-9.80	2.00	17.23	6.18	72.60
QA ISLAMIC BK	21.310	1.00	1.00	1.00	3.60	-0.23	1.63	11.38	3.75	50.48
MASRAF AL RAYA	2.242	0.18	0.18	0.18	-0.36	-8.97	0.85	14.26	4.46	20.90
MESAEED PETRO	1.338	0.30	0.30	0.30	-6.95	-10.50	1.04	23.64	4.26	16.85
Oman										
BANK MUSCAT	0.273	-0.36	-0.36	-0.36	7.91	8.33	0.86	9.93	6.04	2.05
OMANTEL	0.847	0.36	0.36	0.36	-0.35	-9.89	0.99	7.94	6.49	0.64
BANK DHOFAR	0.147	0.00	0.00	0.00	2.85	-4.40	0.61	12.89	4.39	0.45
NAT BANK OF OMAN	0.292	0.00	0.00	0.00	0.69	-1.35	0.62	9.14	3.22	0.47
OMINVEST	0.223	1.36	1.36	1.36	-8.18	-5.39	0.68	7.15	6.41	0.21

* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
21-May. 25	26.74%	14.34%	0.07%	6.22%	9.09%	18.06%	13.84%	6.94%	7.44%
28-May. 25	26.78%	14.20%	0.07%	6.44%	8.96%	18.01%	13.94%	6.92%	7.46%

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