



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Sunday, 22nd June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices fell about 2% on Friday, as President Donald Trump holds off for now on helping Israel to destroy OPEC member Iran's nuclear program. Global benchmark Brent fell \$1.84, or 2.33%, to close at \$77.01 per barrel. U.S. crude oil shed \$1.30, or 1.73%, to settle at \$73.84 per barrel.

Kuwait Market

The market closed up by 0.73% at 7,951.1 value traded 124.1 million KD, Premier market value reached 77.8 million KD, closed up by 0.85% at 8,616.1.

KSA Market

The market closed 0.18% up at 10,610.7

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,610.7	0.18	-2.12	-3.45	-11.76	-11.85	1.93	14.99	4.02	9,028.62
Qatar (QE Index)	10,261.1	-0.84	-3.44	-1.93	0.28	-2.93	1.21	11.46	4.72	549.87
Dubai (DFMGI)	5,351.6	1.55	-0.24	-2.35	5.01	3.74	1.73	9.98	5.28	796.30
Abu Dhabi (ADI)	9,513.4	0.96	-0.53	-1.77	1.54	1.00	2.00	14.46	3.06	2,706.35
Bahrain (BAX)	1,874.6	-0.75	-2.24	-2.41	-3.93	-5.60	0.81	8.16	5.42	7.28
Muscat SE INDEX	4,506.5	-0.31	-0.81	-1.20	3.19	-1.53	0.80	9.36	6.29	7.34
SP GCC Comp LMC	178.9	0.40	-1.78	-2.51	-5.94	-4.78	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	154.9	1.80	-0.56	-3.16	2.82	1.77				
Developed Markets										
MSCI World Index	3,881.7	-0.14	-0.49	0.47	6.97	4.69				
U.S. (S&P 500)	5,967.8	-0.22	-0.15	0.95	6.34	1.47	4.57	26.01	1.56	53,268.02
U.K. (FTSE 100)	8,774.7	-0.20	-0.86	0.03	2.24	7.36	1.82	16.57	3.46	2,270.19
Japan (topix)	2,771.3	-0.75	0.54	-1.08	4.23	-0.49	1.41	14.24	2.43	960,756.76
Emerging Markets										
MSCI EM Index	1,189.9	1.07	-0.02	2.81	8.03	10.63				
China (SSE Composite)	3,359.9	-0.07	-0.51	0.37	0.72	0.24	1.36	12.00		44,025.04
India (Sensex)	82,408.2	1.29	1.59	1.18	6.45	5.46	4.39	23.81	1.18	160,330.53
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,951.1	0.73	-2.52	-1.99	-1.52	7.99	1.63	14.83	3.48	48.29
Kuwait Premier Index	8,616.1	0.85	-2.70	-2.08	-0.68	9.92	1.80	16.31	3.33	40.19
Kuwait Main Index	6,860.4	0.16	-1.59	-1.53	-5.60	-0.68	1.09	9.74	4.26	8.10
Kuwait Sector										
Banking	2,013.4	1.10	-2.23	-1.11	-1.50	11.25	1.94	16.28	3.06	30.60
Telecom	1,027.6	0.69	-1.49	-1.10	-2.12	0.97	1.54	9.94	7.38	3.14
Industrials	704.4	-1.38	-8.13	-9.84	-5.46	-2.66	1.09	14.16	5.37	2.38
Financial Services	1,447.1	-0.14	-2.50	-4.60	-4.06	-4.20	1.13	12.36	3.44	4.83
Real Estate	1,655.4	1.43	-0.81	0.74	9.12	22.34	1.15	16.93	1.77	3.52
Basic Materials	823.5	0.14	-9.54	-10.08	-8.39	-9.63	1.51	11.97	6.68	0.46
Health Care	620.7	-3.41	3.17	8.47	8.78	35.44	2.09		1.69	
Consumer Staples	1,196.6	-1.50	-3.44	-1.86	21.23	19.82	2.50	21.76	2.15	0.36
Insurance	1,863.5	1.52	-2.11	0.64	-12.60	-9.33	0.95	9.48	3.46	0.75
Consumer Discretionary	2,188.6	-0.60	-4.09	-6.34	-7.29	3.10				
Energy	1,474.1	-1.02	-1.36	-0.49	11.26	23.97	1.19	9.74	5.27	0.30
Technology	1,040.3	5.15	-3.38	-4.67	-3.38	0.00	1.21			0.01
Utilities	373.7	1.43	-2.07	-0.70	-7.79	-5.96				

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Kuwait

The market is up today by 0.73%, the highest performing sector today is technology at 5.15%.

KSA

Aramco closed at -0.32%, Sabic closed at -1.99%. STC closed at -0.36% and Al-Rajhi closed at -0.33%.

UAE

ETISALAT.AD closed at 1.70%, FAB.AD closed at 2.67%.

* 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	1.74	-2.00	-2.41	-6.52	9.34	1.83	14.42	3.57	8.08
KFH	0.740	0.82	-2.25	-1.33	0.53	7.13	2.12	17.11	2.75	13.49
ZAIN	0.469	0.86	-1.88	-1.68	-2.29	0.00	1.59	8.97	7.46	2.03
BOUBYAN BANK	0.674	0.90	-1.75	0.30	3.16	26.15	2.85	32.62	1.41	2.96
AGILITY	0.198	-5.26	-21.12	-20.80	-21.43	-19.84	0.51	8.91	5.05	0.52
Saudi Arabia										
ARAMCO	24.82	-0.32	-0.56	-0.72	-7.21	-11.52	4.07	15.54	6.55	6,006.44
SABIC	54.20	-1.99	-2.52	-2.69	-14.91	-19.10	1.04	644.62	6.27	162.60
STC	41.60	-0.36	-0.83	-0.72	-4.10	8.73	2.28	18.36	4.57	208.00
AL-RAJHI BANK	91.20	-0.33	-1.51	0.11	-10.59	-3.59	2.72	18.11	2.97	364.80
NCB	34.15	-0.58	-2.57	-1.59	-4.74	2.25	1.05	9.54	5.56	204.90
Abu Dhabi										
ETISALAT.AD	16.46	1.70	-0.71	-2.56	-0.95	2.57	2.86	10.57	4.96	145.58
FAB.AD	15.00	2.67	-1.79	-4.35	11.43	12.08	1.34	9.82	4.87	170.13
EMIRATES NBD	21.15	0.24	-0.24	-5.58	4.70	-1.40	1.06	6.08	4.73	133.60
DB ISLAMIC DB	8.36	1.95	-0.48	1.33	16.60	17.91	1.33	7.89	5.38	60.53
EMAR.DU	12.40	1.22	-1.20	-5.70	-7.12	-3.50	1.37	7.66	8.06	109.60
Qatar										
QNB	16.850	0.18	-2.21	-0.59	4.66	-2.54	1.37	9.90	4.15	155.63
INDUSTREIS QAT	12.050	-0.82	0.58	1.69	-6.52	-9.19	2.02	17.35	6.14	72.90
QA ISLAMIC BK	21.290	-1.34	-3.97	0.90	3.50	-0.33	1.63	11.37	3.76	50.31
MASRAF AL RAYA	2.220	0.63	-2.76	-0.80	-1.33	-9.87	0.84	14.12	4.50	20.65
MESAIEED PETRO	1.307	0.54	-0.23	-2.02	-9.11	-12.58	1.02	23.10	4.36	16.42
Oman										
BANK MUSCAT	0.273	0.37	-0.36	0.00	8.30	8.73	0.86	9.93	6.04	2.05
OMANTEL	0.842	-0.12	0.48	0.00	-0.71	-10.21	0.98	7.89	6.53	0.63
BANK DHOFAR	0.134	0.00	-0.74	-8.16	-5.55	-12.21	0.56	11.75	4.82	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	-0.45	-0.45	-0.45	-9.82	-7.09	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
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

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