



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Monday, 23rd June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil markets are entering a new phase of uncertainty after the U.S. joined the war between Iran and Israel, with experts warning of triple-digit prices. Investors are closely watching for Tehran's reaction following the U.S.' strikes on its nuclear facilities, with Iran's foreign minister warning his country reserved "all options" to defend its sovereignty. Oil futures were up over 2% as of early Asia hours. U.S. WTI crude rose more than 2% to \$75.22 per barrel, while global benchmark Brent was up nearly 2% at \$78.53 per barrel.

Kuwait Market

The market closed up by 0.63% at 8,001.5 value traded 114.2 million KD, Premier market value reached 67.2 million KD, closed up by 0.40% at 8,650.6.

KSA Market

The market closed -0.34% down at 10,574.3

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,574.3	-0.34	-0.34	-3.79	-12.06	-12.15	1.92	14.91	4.03	9,014.96
Qatar (QE Index)	10,280.2	0.19	0.19	-1.75	0.46	-2.75	1.21	11.46	4.71	550.80
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	2,706.11
Bahrain (BAX)	1,879.7	0.27	0.27	-2.14	-3.67	-5.35	0.81	8.18	5.41	7.31
Muscat SE INDEX	4,525.3	0.42	0.42	-0.78	3.62	-1.12	0.81	9.38	6.26	7.38
SP GCC Comp LMC	178.4	-0.30	-0.30	-2.81	-6.22	-5.07	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	154.9	0.00	0.00	-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	1.83	16.60	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	8,001.5	0.63	0.63	-1.37	-0.90	8.68	1.63	14.83	3.48	48.29
Kuwait Premier Index	8,650.6	0.40	0.40	-1.69	-0.28	10.36	1.80	16.31	3.33	40.19
Kuwait Main Index	6,984.4	1.81	1.81	0.25	-3.90	1.12	1.09	9.74	4.26	8.10
Kuwait Sector										
Banking	2,019.9	0.33	0.33	-0.79	-1.18	11.61	1.94	16.28	3.06	30.60
Telecom	1,029.1	0.15	0.15	-0.95	-1.97	1.12	1.54	9.94	7.38	3.14
Industrials	711.3	0.98	0.98	-8.95	-4.53	-1.70	1.09	14.16	5.37	2.38
Financial Services	1,469.3	1.53	1.53	-3.14	-2.59	-2.73	1.13	12.36	3.44	4.83
Real Estate	1,693.3	2.29	2.29	3.05	11.62	25.14	1.15	16.93	1.77	3.52
Basic Materials	814.4	-1.10	-1.10	-11.07	-9.40	-10.63	1.51	11.97	6.68	0.46
Health Care	646.3	4.12	4.12	12.94	13.26	41.02	2.09		1.69	
Consumer Staples	1,222.7	2.18	2.18	0.28	23.87	22.43	2.50	21.76	2.15	0.36
Insurance	1,871.6	0.44	0.44	1.08	-12.22	-8.93	0.95	9.48	3.46	0.75
Consumer Discretionary	2,183.2	-0.25	-0.25	-6.57	-7.52	2.84				
Energy	1,523.4	3.34	3.34	2.84	14.98	28.11	1.19	9.74	5.27	0.30
Technology	1,091.3	4.90	4.90	0.00	1.35	4.90	1.21			0.01
Utilities	371.1	-0.70	-0.70	-1.40	-8.44	-6.62				

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Kuwait

The market is up today by 0.63%, the highest performing sector today is technology at 4.9%.

KSA

Aramco closed at 0%, Sabc closed at 0.18%. STC closed at 0.24% and Al-Rajhi closed at -1.21%.

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	0.934	0.11	0.11	-2.30	-6.42	9.45	1.83	14.43	3.57	8.17
KFH	0.745	0.68	0.68	-0.67	1.21	7.86	2.14	17.23	2.73	13.77
ZAIN	0.471	0.43	0.43	-1.26	-1.88	0.43	1.60	9.01	7.43	2.04
BOUBYAN BANK	0.674	0.00	0.00	0.30	3.16	26.15	2.85	32.62	1.41	2.97
AGILITY	0.205	3.54	3.54	-18.00	-18.65	-17.00	0.53	9.23	4.88	0.55
Saudi Arabia										
ARAMCO	24.82	0.00	0.00	-0.72	-7.21	-11.52	4.07	15.54	6.55	6,003.56
SABIC	54.30	0.18	0.18	-2.51	-14.76	-18.96	1.04	645.81	6.26	162.82
STC	41.70	0.24	0.24	-0.48	-3.87	8.99	2.28	18.41	4.56	208.40
AL-RAJHI BANK	90.10	-1.21	-1.21	-1.10	-11.67	-4.76	2.69	17.90	3.01	360.23
NCB	33.70	-1.32	-1.32	-2.88	-6.00	0.90	1.04	9.42	5.64	202.10
Abu Dhabi										
ETISALAT.AD	16.74	1.70	-0.71	-2.56	-0.95	2.57	2.86	10.57	4.96	145.58
FAB.AD	15.40	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	16.700	-0.89	-0.89	-1.47	3.73	-3.41	1.35	9.81	4.19	154.71
INDUSTREIS QAT	12.070	0.17	0.17	1.86	-6.36	-9.04	2.02	17.38	6.13	73.24
QA ISLAMIC BK	21.140	-0.70	-0.70	0.19	2.77	-1.03	1.62	11.29	3.78	50.10
MASRAF AL RAYA	2.214	-0.27	-0.27	-1.07	-1.60	-10.11	0.84	14.08	4.52	20.65
MESAIEED PETRO	1.314	0.54	0.54	-1.50	-8.62	-12.11	1.02	23.22	4.34	16.56
Oman										
BANK MUSCAT	0.274	0.37	0.37	0.00	8.30	8.73	0.86	9.97	6.02	2.06
OMANTEL	0.842	0.00	0.00	-0.24	-0.94	-10.43	0.98	7.89	6.53	0.63
BANK DHOFAR	0.134	0.00	0.00	-8.84	-6.25	-12.86	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	0.218	-0.91	-0.91	-0.91	-10.24	-7.52	0.66	6.99	6.55	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

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