



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Tuesday, 24th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices tumbled on Tuesday to their lowest level in more than a week as U.S. President Donald Trump said a ceasefire has been agreed between Iran and Israel, relieving worries of supply disruption in the area. Brent crude futures fell \$2.69 or 3.76% to \$68.79 a barrel as of 0006 GMT, after falling more than 4% earlier in the session and touching its lowest level since June 11.

Kuwait Market

The market closed up by 0.65% at 8,053.7 value traded 106.0 million KD, Premier market value reached 55.8 million KD, closed up by 0.52% at 8,695.7.

KSA Market

The market closed 1.29% up at 10,710.2

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,710.2	1.29	0.94	-2.55	-10.93	-11.02	1.95	15.12	3.98	9,043.43
Qatar (QE Index)	10,332.8	0.51	0.70	-1.24	0.98	-2.25	1.22	11.52	4.69	553.77
Dubai (DFMGI)	5,411.3	1.12	1.12	-1.26	6.18	4.90	1.74	10.09	5.22	804.12
Abu Dhabi (ADI)	9,557.6	0.46	0.46	-1.32	2.01	1.47	2.02	14.56	3.04	2,726.26
Bahrain (BAX)	1,883.9	0.22	0.49	-1.93	-3.46	-5.14	0.81	8.21	5.39	7.32
Muscat SE INDEX	4,523.4	-0.04	0.38	-0.82	3.58	-1.16	0.81	9.37	6.26	7.37
SP GCC Comp LMC	178.4	0.00	-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	3,905.9	0.62	0.62	1.10	7.64	5.34				
U.S. (S&P 500)	6,025.2	0.96	0.96	1.92	7.37	2.44	4.58	26.08	1.56	53,266.69
U.K. (FTSE 100)	8,758.0	-0.19	-0.19	-0.16	2.04	7.16	1.83	16.57	3.47	2,265.45
Japan (topix)	2,761.2	-0.36	-0.36	-1.44	3.85	-0.85	1.41	14.19	2.44	957,962.87
Emerging Markets										
MSCI EM Index	1,189.9	0.00	0.00	2.81	8.03	10.63				
China (SSE Composite)	3,381.6	0.65	0.65	1.02	1.37	0.89	1.36	12.00		44,025.04
India (Sensex)	81,896.8	-0.62	-0.62	0.55	5.79	4.81	4.45	23.76	1.19	161,586.42
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,053.7	0.65	1.29	-0.73	-0.25	9.39	1.64	14.90	3.46	48.60
Kuwait Premier Index	8,695.7	0.52	0.92	-1.17	0.24	10.93	1.81	16.38	3.32	40.35
Kuwait Main Index	7,075.2	1.30	3.13	1.55	-2.65	2.43	1.11	9.84	4.20	8.25
Kuwait Sector										
Banking	2,028.7	0.43	0.76	-0.36	-0.75	12.09	1.94	16.33	3.05	30.70
Telecom	1,034.9	0.56	0.71	-0.39	-1.42	1.69	1.55	9.95	7.37	3.14
Industrials	712.9	0.22	1.21	-8.75	-4.31	-1.48	1.10	14.30	5.32	2.41
Financial Services	1,487.3	1.22	2.77	-1.96	-1.40	-1.54	1.14	12.56	3.39	4.90
Real Estate	1,726.6	1.96	4.30	5.07	13.81	27.60	1.18	17.09	1.73	3.60
Basic Materials	827.7	1.62	0.50	-9.62	-7.93	-9.17	1.49	11.84	6.76	0.46
Health Care	621.9	-3.77	0.19	8.68	8.99	35.69	2.17		1.60	
Consumer Staples	1,269.2	3.80	6.07	4.10	28.59	27.09	2.56	22.27	2.10	0.37
Insurance	1,875.5	0.21	0.65	1.29	-12.04	-8.75	0.95	9.52	3.45	0.76
Consumer Discretionary	2,202.8	0.90	0.65	-5.73	-6.69	3.77				
Energy	1,536.0	0.82	4.20	3.69	15.93	29.17	1.23	10.07	5.10	0.31
Technology	1,127.6	3.33	8.39	3.33	4.73	8.39	1.27			0.02
Utilities	376.3	1.42	0.71	0.00	-7.14	-5.30				

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Kuwait

The market is up today by 0.65%, the highest performing sector today is consumer staples at 3.8%.

KSA

Aramco closed at -0.32%, Sabc closed at 1.10%. STC closed at 0.96% and Al-Rajhi closed at 1.55%.

UAE

ETISALAT.AD closed at 0.96%, FAB.AD closed at 0.39%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.936	0.21	0.32	-2.09	-6.22	9.69	1.83	14.46	3.56	8.17
KFH	0.747	0.27	0.95	-0.40	1.48	8.14	2.14	17.28	2.73	13.78
ZAIN	0.474	0.64	1.07	-0.63	-1.25	1.07	1.61	9.06	7.38	2.05
BOUBAYAN BANK	0.678	0.59	0.59	0.89	3.78	26.90	2.87	32.82	1.40	2.99
AGILITY	0.201	-1.95	1.52	-19.60	-20.24	-18.62	0.52	9.05	4.98	0.54
Saudi Arabia										
ARAMCO	24.74	-0.32	-0.32	-1.04	-7.51	-11.80	4.06	15.49	6.57	5,989.31
SABIC	54.90	1.10	1.29	-1.44	-13.81	-18.06	1.06	652.95	6.19	164.76
STC	42.10	0.96	1.20	0.48	-2.95	10.03	2.31	18.59	4.51	210.58
AL-RAJHI BANK	91.50	1.55	0.33	0.44	-10.29	-3.28	2.73	18.17	2.96	366.14
NCB	34.20	1.48	0.15	-1.44	-4.60	2.40	1.05	9.56	5.56	205.28
Abu Dhabi										
ETISALAT.AD	16.90	0.96	0.96	-1.63	0.00	3.55	2.88	10.67	4.91	146.99
FAB.AD	15.46	0.39	0.39	-3.98	11.87	12.52	1.34	9.86	4.85	170.81
EMIRATES NBD	21.35	0.95	0.95	-4.69	5.69	-0.47	1.07	6.14	4.68	134.87
DB ISLAMIC DB	8.51	1.79	1.79	3.15	18.69	20.03	1.35	8.03	5.29	61.62
EMAR.DU	12.75	2.82	2.82	-3.04	-4.49	-0.78	1.40	7.88	7.84	112.70
Qatar										
QNB	16.750	0.30	-0.59	-1.18	4.04	-3.12	1.36	9.84	4.18	154.34
INDUSTREIS QAT	12.170	0.83	1.00	2.70	-5.59	-8.29	2.04	17.52	6.08	73.45
QA ISLAMIC BK	21.100	-0.19	-0.89	0.00	2.58	-1.22	1.62	11.27	3.79	49.74
MASRAF AL RAYA	2.212	-0.09	-0.36	-1.16	-1.69	-10.19	0.84	14.07	4.52	20.52
MESAIEED PETRO	1.300	-1.07	-0.54	-2.55	-9.60	-13.04	1.01	22.97	4.38	16.29
Oman										
BANK MUSCAT	0.273	-0.36	0.00	-0.36	7.91	8.33	0.86	9.93	6.04	2.05
OMANTEL	0.845	0.36	0.36	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.135	0.75	0.75	-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	0.221	1.38	0.45	0.45	-9.00	-6.24	0.67	7.09	6.46	0.21

* GCC Markets performance at the latest close.

Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBAYAN	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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