



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Sunday, 29th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices rose on Friday but posted their steepest weekly decline in three years, as the absence of significant supply disruption from the Iran-Israel conflict saw any risk premium evaporate. Brent crude futures rose 4 cents to close at \$67.77 a barrel, while U.S. West Texas Intermediate crude gained 28 cents, or 0.43%, to settle at \$65.52.

Kuwait Market

The market closed up by 0.76% at 8,293.4 value traded 120.0 million KD, Premier market value reached 76.2 million KD, closed up by 0.67% at 8,963.2.

KSA Market

The market closed 0.86% up at 11,068.3

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,068.3	0.86	4.31	0.71	-7.96	-8.04	2.02	15.69	3.85	9,068.69
Qatar (QE Index)	10,684.7	0.39	4.13	2.12	4.41	1.07	1.26	11.90	4.54	572.26
Dubai (DFMGI)	5,683.9	1.26	6.21	3.71	11.53	10.18	1.84	10.65	4.95	844.84
Abu Dhabi (ADI)	9,886.2	0.77	3.92	2.08	5.52	4.96	2.11	15.18	2.91	2,816.25
Bahrain (BAX)	1,921.0	0.47	2.47	0.00	-1.56	-3.27	0.84	8.46	5.25	7.46
Muscat SE INDEX	4,507.0	-0.15	0.01	-1.18	3.21	-1.52	0.80	9.35	6.28	7.35
SP GCC Comp LMC	187.4	-0.01	4.77	2.14	-1.45	-0.24	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	166.2	0.00	7.29	3.90	10.32	9.19				
Developed Markets										
MSCI World Index	4,009.0	0.62	3.28	3.77	10.48	8.12				
U.S. (S&P 500)	6,173.1	0.52	3.44	4.42	10.00	4.96	4.73	26.96	1.51	55,116.21
U.K. (FTSE 100)	8,798.9	0.72	0.28	0.30	2.52	7.66	1.84	16.64	3.45	2,274.61
Japan (topix)	2,840.5	1.28	2.50	1.39	6.84	2.00	1.44	14.62	2.37	982,811.91
Emerging Markets										
MSCI EM Index	1,228.5	0.13	3.25	6.15	11.54	14.23				
China (SSE Composite)	3,424.2	-0.70	1.91	2.29	2.65	2.16	1.36	12.00		44,025.04
India (Sensex)	84,058.9	0.36	2.00	3.20	8.58	7.58	4.57	24.38	1.17	165,870.65
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,293.4	0.76	4.30	2.23	2.72	12.64	1.70	15.44	3.34	50.39
Kuwait Premier Index	8,963.2	0.67	4.03	1.87	3.33	14.34	1.88	16.97	3.20	41.81
Kuwait Main Index	7,251.1	1.22	5.69	4.08	-0.23	4.98	1.15	10.16	4.04	8.58
Kuwait Sector										
Banking	2,094.4	0.70	4.02	2.87	2.46	15.72	2.01	16.94	2.94	31.83
Telecom	1,051.1	0.48	2.29	1.16	0.12	3.28	1.58	10.16	7.21	3.21
Industrials	721.6	0.20	2.45	-7.63	-3.14	-0.28	1.12	14.50	5.25	2.44
Financial Services	1,528.3	0.48	5.61	0.75	1.32	1.17	1.19	13.10	3.26	5.10
Real Estate	1,812.0	2.28	9.46	10.27	19.44	33.91	1.27	17.79	1.62	3.88
Basic Materials	860.9	0.86	4.54	-5.99	-4.23	-5.53	1.58	12.51	6.39	0.49
Health Care	575.3	-4.72	-7.31	0.55	0.83	25.54	1.73		1.78	
Consumer Staples	1,294.3	4.42	8.16	6.15	31.13	29.60	2.71	23.64	1.98	0.39
Insurance	1,898.6	0.02	1.88	2.54	-10.96	-7.62	0.97	9.66	3.40	0.77
Consumer Discretionary	2,288.3	0.90	4.55	-2.07	-3.06	7.79				
Energy	1,477.3	2.70	0.22	-0.27	11.50	24.24	1.19	9.71	5.26	0.30
Technology	1,069.4	-4.55	2.80	-2.00	-0.68	2.80	1.25			0.01
Utilities	381.6	0.69	2.11	1.40	-5.84	-3.97				

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Kuwait

The market is up today by 0.76%, the highest performing sector today is consumer staples at 4.42%.

KSA

Aramco closed at 0.66%, Sabic closed at 0.73%. STC closed at 0.93% and Al-Rajhi closed at 0.85%.

UAE

ETISALAT.AD closed at 0.70%, FAB.AD closed flat at 0%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.960	0.10	2.89	0.42	-3.82	12.50	1.88	14.83	3.47	8.39
KFH	0.775	1.04	4.73	3.33	5.28	12.20	2.22	17.92	2.63	14.32
ZAIN	0.482	0.42	2.77	1.05	0.42	2.77	1.63	9.22	7.26	2.09
BOUBYAN BANK	0.702	1.30	4.15	4.46	7.45	31.39	2.97	33.98	1.36	3.10
AGILITY	0.204	0.49	3.03	-18.40	-19.05	-17.41	0.53	9.18	4.90	0.55
Saudi Arabia										
ARAMCO	24.30	0.66	-2.10	-2.80	-9.16	-13.37	3.99	15.22	6.69	5,880.60
SABIC	54.90	0.73	1.29	-1.44	-13.81	-18.06	1.06	652.95	6.19	164.70
STC	43.35	0.93	4.21	3.46	-0.07	13.30	2.37	19.14	4.38	216.75
AL-RAJHI BANK	94.70	0.85	3.84	3.95	-7.16	0.11	2.83	18.81	2.86	378.80
NCB	36.00	0.98	5.42	3.75	0.42	7.78	1.11	10.06	5.28	216.00
Abu Dhabi										
ETISALAT.AD	17.28	0.70	3.23	0.58	2.25	5.88	2.95	10.91	4.80	150.28
FAB.AD	16.50	0.00	7.14	2.48	19.39	20.09	1.43	10.52	4.55	182.29
EMIRATES NBD	23.00	1.10	8.75	2.68	13.86	7.23	1.15	6.61	4.35	145.28
DB ISLAMIC DB	9.18	4.91	9.81	11.27	28.03	29.48	1.46	8.66	4.90	66.47
EMAR.DU	13.45	0.00	8.47	2.28	0.75	4.67	1.48	8.31	7.43	118.88
Qatar										
QNB	17.200	0.00	2.08	1.47	6.83	-0.52	1.39	10.11	4.07	158.87
INDUSTREIS QAT	12.300	0.49	2.07	3.80	-4.58	-7.31	2.06	17.71	6.02	74.42
QA ISLAMIC BK	22.000	0.27	3.33	4.27	6.95	3.00	1.68	11.75	3.64	51.98
MASRAF AL RAYA	2.321	1.40	4.55	3.71	3.16	-5.77	0.88	14.76	4.31	21.59
MESAIEED PETRO	1.328	0.61	1.61	-0.45	-7.65	-11.17	1.03	23.47	4.29	16.68
Oman										
BANK MUSCAT	0.275	-0.36	0.73	0.36	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.840	-0.59	-0.24	-0.47	-1.18	-10.64	0.98	7.87	6.55	0.63
BANK DHOFAR	0.129	0.00	-3.73	-12.24	-9.74	-16.11	0.54	11.32	5.00	0.39
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	0.00	-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
18-June. 25	26.96%	14.09%	0.08%	6.70%	11.50%	18.11%	14.20%	6.98%	7.61%
25-June. 25	26.96%	14.00%	0.08%	7.37%	12.22%	4.96%	14.21%	6.95%	7.66%

End of Report

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