



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Tuesday, 3rd June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices rose in early Asia trade on Tuesday on concerns about supply, with Iran set to reject a U.S. nuclear deal proposal that would be key to easing sanctions on the major oil producer, and with production in Canada hit by wildfires. Brent crude futures gained 55 cents, or 0.85%, to \$65.18 a barrel by 0000 GMT. U.S. West Texas Intermediate crude was up 59 cents, or 0.94%, to \$63.11 a barrel, after rising around 1% earlier in the session.

Kuwait Market

The market closed up by 0.01% at 8,147.9 value traded 86.9 million KD, Premier market value reached 69.6 million KD, closed up by 0.17% at 8,847.1.

KSA Market

The market closed down by -1.50% at 10,850.1

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	10,850.1	-1.50	-1.50	-1.50	-9.98	-10.06	1.97	15.27	3.94	9,157.11
Qatar (QE Index)	10,484.1	-0.16	0.20	0.20	2.45	-0.82	1.24	11.70	4.62	562.43
Dubai (DFMGI)	5,484.7	0.08	0.08	0.08	7.62	6.32	1.77	10.22	5.14	814.79
Abu Dhabi (ADI)	9,647.1	-0.39	-0.39	-0.39	2.97	2.42	2.04	14.71	3.01	2,721.46
Bahrain (BAX)	1,920.5	0.09	-0.02	-0.02	-1.58	-3.29	0.83	8.45	5.26	7.46
Muscat SE INDEX	4,570.8	0.12	0.21	0.21	4.67	-0.13	0.81	9.49	6.20	7.44
SP GCC Comp LMC	181.8	0.00	-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	3,881.4	0.46	0.46	0.46	6.97	4.68				
U.S. (S&P 500)	5,935.9	0.41	0.41	0.41	5.78	0.92	4.52	25.84	1.57	52,757.10
U.K. (FTSE 100)	8,774.3	0.02	0.02	0.02	2.23	7.36	1.83	16.58	3.44	2,273.79
Japan (topix)	2,777.3	-0.87	-0.87	-0.87	4.46	-0.27	1.42	14.28	2.43	962,793.95
Emerging Markets										
MSCI EM Index	1,153.8	-0.31	-0.31	-0.31	4.76	7.28				
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)	81,373.8	-0.09	-0.09	-0.09	5.11	4.14	4.37	23.29	1.19	158,564.68
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,147.9	0.01	0.44	0.44	0.91	10.67	1.67	15.24	3.40	49.47
Kuwait Premier Index	8,847.1	0.17	0.55	0.55	1.99	12.86	1.85	16.72	3.25	41.20
Kuwait Main Index	6,958.4	-0.79	-0.12	-0.12	-4.25	0.74	1.12	10.15	4.19	8.27
Kuwait Sector										
Banking	2,049.8	0.25	0.67	0.67	0.28	13.26	1.97	16.53	3.01	31.07
Telecom	1,049.9	0.69	1.05	1.05	0.01	3.16	1.57	10.09	7.27	3.19
Industrials	778.9	-0.26	-0.30	-0.30	4.55	7.64	1.21	15.72	4.85	2.64
Financial Services	1,512.3	-0.67	-0.30	-0.30	0.26	0.12	1.18	13.08	3.30	5.08
Real Estate	1,629.1	-1.61	-0.86	-0.86	7.38	20.39	1.16	17.59	1.77	3.52
Basic Materials	906.6	0.00	-1.01	-1.01	0.86	-0.51	1.66	13.17		0.51
Health Care	586.1	-2.45	2.43	2.43	2.72	27.90	2.03		1.74	
Consumer Staples	1,226.1	-1.43	0.56	0.56	24.22	22.77	2.60	22.55	2.07	0.38
Insurance	1,857.0	0.15	0.29	0.29	-12.91	-9.65	0.94	9.44	3.48	0.75
Consumer Discretionary	2,355.6	1.21	0.81	0.81	-0.21	10.96				
Energy	1,518.0	-0.12	2.48	2.48	14.57	27.66	1.23	10.00	5.11	0.31
Technology	1,076.7	-4.52	-1.33	-1.33	0.00	3.50	1.31			0.02
Utilities	376.3	-1.38	0.00	0.00	-7.14	-5.30				

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Kuwait

The market is up today by 0.01%, the best performing sector today is consumer discretionary 1.2%.

KSA

Aramco closed at 0.73%, Sabic closed at 0.73%. STC closed at 0% and Al-Rajhi closed at 1.69%.

UAE

ETISALAT.AD closed at -0.47%, FAB.AD closed at -2.61%.

* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.952	-0.31	-0.42	-0.42	-4.62	11.56	1.86	14.71	3.50	8.31
KFH	0.753	-0.13	0.40	0.40	2.29	9.01	2.16	17.41	2.71	13.90
ZAIN	0.481	0.84	0.84	0.84	0.21	2.56	1.63	9.20	7.28	2.08
BOUBYAN BANK	0.673	0.00	0.15	0.15	3.01	25.96	2.85	32.58	1.42	2.97
AGILITY	0.251	-0.40	0.40	0.40	-0.40	1.62	0.65	11.30	3.98	0.67
Saudi Arabia										
ARAMCO	25.00	0.73	0.00	0.00	-6.54	-10.87	4.10	15.66	6.50	6,050.81
SABIC	55.30	0.73	-0.72	-0.72	-13.19	-17.46	1.06	657.71	6.15	165.92
STC	41.95	0.00	0.12	0.12	-3.29	9.64	2.30	18.52	4.53	209.78
AL-RAJHI BANK	90.40	1.69	-0.77	-0.77	-11.37	-4.44	2.70	17.96	3.00	361.65
NCB	33.85	0.00	-2.45	-2.45	-5.58	1.35	1.04	9.46	5.61	203.13
Abu Dhabi										
ETISALAT.AD	17.10	-0.47	-0.47	-0.47	1.18	4.78	2.92	10.79	4.85	148.73
FAB.AD	15.68	-2.61	-2.61	-2.61	13.46	14.12	1.36	10.00	4.78	173.24
EMIRATES NBD	22.10	-1.34	-1.34	-1.34	9.41	3.03	1.10	6.35	4.52	139.61
DB ISLAMIC DB	8.23	-0.24	-0.24	-0.24	14.78	16.08	1.31	7.77	5.47	59.60
EMAR.DU	13.20	0.38	0.38	0.38	-1.12	2.72	1.45	8.16	7.58	116.68
Qatar										
QNB	17.140	0.00	1.12	1.12	6.46	-0.87	1.39	10.07	4.08	157.93
INDUSTREIS QAT	11.850	-1.00	0.00	0.00	-8.07	-10.70	1.98	17.06	6.24	71.52
QA ISLAMIC BK	21.510	0.94	1.94	1.94	4.57	0.70	1.65	11.49	3.72	50.70
MASRAF AL RAYA	2.242	0.00	0.18	0.18	-0.36	-8.97	0.85	14.26	4.46	20.80
MESAIEED PETRO	1.325	-0.97	-0.67	-0.67	-7.86	-11.37	1.03	23.41	4.30	16.61
Oman										
BANK MUSCAT	0.279	2.20	1.82	1.82	10.28	10.71	0.88	10.15	5.91	2.09
OMANTEL	0.845	-0.24	0.12	0.12	-0.59	-10.11	0.99	7.92	6.51	0.63
BANK DHOFAR	0.145	-1.36	-1.36	-1.36	1.45	-5.70	0.61	12.72	4.45	0.44
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	0.224	0.45	1.82	1.82	-7.76	-4.97	0.68	7.18	6.38	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

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