



شركة الاستثمارات الوطنية
National Investments Company



GCC DAILY MORNING BRIEF

Monday, 30th June 2025

NIC RESEARCH AND STUDIES DEP

What Move the GCC markets

Oil Prices

Oil prices fell 1% on Monday as an easing of geopolitical risks in the Middle East and the prospect of another OPEC+ output hike in August boosted the supply outlook. Brent crude futures fell 66 cents, or 0.97%, to \$67.11 a barrel by 0031 GMT, ahead of the August contract's expiry later on Monday. The more active September contract was at \$65.97, down 83 cents. U.S. West Texas Intermediate crude dropped 94 cents, or 1.43%, to \$64.58 a barrel.

Kuwait Market

The market closed up by 1.75% at 8,438.5 value traded 1626 million KD, Premier market value reached 102.5 million KD, closed up by 2.12% at 9,153.2.

KSA Market

The market closed 1.21% up at 11,202.6

* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,202.6	1.21	1.21	1.93	-6.84	-6.93	2.05	15.90	3.80	9,106.63
Qatar (QE Index)	10,768.2	0.78	0.78	2.92	5.23	1.86	1.27	12.00	4.50	576.99
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)	1,937.3	0.85	0.85	0.86	-0.72	-2.45	0.84	8.57	5.19	7.53
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	189.4	1.07	1.07	3.24	-0.39	0.83	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	166.2	0.00	0.00	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	8,438.5	1.75	1.75	4.02	4.51	14.61	1.70	15.44	3.34	50.39
Kuwait Premier Index	9,153.2	2.12	2.12	4.02	5.52	16.77	1.88	16.97	3.20	41.81
Kuwait Main Index	7,245.1	-0.08	-0.08	3.99	-0.31	4.89	1.15	10.16	4.04	8.58
Kuwait Sector										
Banking	2,147.5	2.54	2.54	5.48	5.06	18.66	2.01	16.94	2.94	31.83
Telecom	1,052.7	0.15	0.15	1.31	0.27	3.43	1.58	10.16	7.21	3.21
Industrials	723.0	0.19	0.19	-7.45	-2.96	-0.09	1.12	14.50	5.25	2.44
Financial Services	1,552.4	1.58	1.58	2.34	2.92	2.77	1.19	13.10	3.26	5.10
Real Estate	1,801.5	-0.58	-0.58	9.63	18.75	33.14	1.27	17.79	1.62	3.88
Basic Materials	870.5	1.11	1.11	-4.95	-3.16	-4.47	1.58	12.51	6.39	0.49
Health Care	571.2	-0.72	-0.72	-0.18	0.11	24.64	1.73		1.78	
Consumer Staples	1,260.4	-2.61	-2.61	3.38	27.70	26.21	2.71	23.64	1.98	0.39
Insurance	1,903.8	0.27	0.27	2.82	-10.71	-7.37	0.97	9.66	3.40	0.77
Consumer Discretionary	2,306.9	0.81	0.81	-1.27	-2.28	8.67				
Energy	1,463.1	-0.96	-0.96	-1.23	10.43	23.04	1.19	9.71	5.26	0.30
Technology	1,134.9	6.12	6.12	4.00	5.41	9.09	1.25			0.01
Utilities	386.8	1.38	1.38	2.80	-4.55	-2.65				

NIC RESEARCH AND STUDIES DEP

Kuwait

The market is up today by 1.75%, the highest performing sector today is technology at 6.12%.

KSA

Aramco closed at 0%, Sabic closed at 0%. STC closed at -0.35% and Al-Rajhi closed at 2.43%.

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	0.988	2.92	2.92	3.35	-1.01	15.78	1.93	15.27	3.37	8.62
KFH	0.795	2.58	2.58	6.00	8.00	15.09	2.28	18.39	2.56	14.66
ZAIN	0.482	0.00	0.00	1.05	0.42	2.77	1.63	9.22	7.26	2.08
BOUBYAN BANK	0.718	2.28	2.28	6.85	9.90	34.39	3.04	34.75	1.33	3.16
AGILITY	0.199	-2.45	-2.45	-20.40	-21.03	-19.43	0.52	8.96	5.03	0.53
Saudi Arabia										
ARAMCO	24.30	0.00	0.00	-2.80	-9.16	-13.37	3.99	15.22	6.69	5,880.60
SABIC	54.90	0.00	0.00	-1.44	-13.81	-18.06	1.06	652.95	6.19	164.70
STC	43.20	-0.35	-0.35	3.10	-0.41	12.91	2.37	19.07	4.40	216.00
AL-RAJHI BANK	97.00	2.43	2.43	6.48	-4.90	2.54	2.90	19.27	2.79	388.00
NCB	36.18	0.50	0.50	4.27	0.92	8.32	1.11	10.11	5.25	217.08
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	17.400	1.16	1.16	2.65	8.07	0.64	1.41	10.22	4.02	161.33
INDUSTREIS QAT	12.470	1.38	1.38	5.23	-3.26	-6.03	2.09	17.95	5.93	75.73
QA ISLAMIC BK	22.100	0.45	0.45	4.74	7.44	3.46	1.69	11.80	3.62	52.42
MASRAF AL RAYA	2.338	0.73	0.73	4.47	3.91	-5.08	0.88	14.87	4.28	21.83
MESAIEED PETRO	1.339	0.83	0.83	0.37	-6.88	-10.43	1.04	23.66	4.26	16.89
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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed, and others authorized to receive it.

CONTACT US

National Investments Company K.S.C.P.

P. O. Box 25667, Safat 13117

State of Kuwait - +965 2226 6608

@ nic | www.nic.com.kw