

Financial Services Company GCC Daily Report

18-Oct-23

2023

Research Department

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FSC Daily Report

18/10/2023



Indicator	Price Momentum			T12M Price to Earnings		T12M Price to Book		Dividend Yield %
	Last price	% Chg, 1 Day	% chg, YTD	Last	5 Year Avg T12M P/E	TTM P/B	5 Year Avg T12M P/B	
MSCI World Index	2,888.62	0.1	11.0	18.6	20.5	2.9	2.7	2.08%
MSCI Emerging Markets Index	951.21	0.5	(0.5)	13.7	14.8	1.5	1.6	2.85%
MSCI FM FRONTIER MARKETS	480.20	(0.9)	1.7	9.2	13.0	1.6	1.8	4.09%

GCC	Price Momentum			T12M Price to Earnings		T12M Price to Book		Dividend Yield %
	Last price	% Chg, 1 Day	% chg, YTD	Last	5 Year Avg TTM P/E	TTM P/B	5 Year Avg TTM P/B	
MSCI GCC Countries ex Saudi Arabia In	517.30	1.4	(7.4)	11.8	14.7	1.5	1.7	3.82%
Muscat Stock Exchange MSX 30 Index	4,704.13	(0.4)	(3.2)	15.6	11.4	0.8	0.8	4.70%
Tadawul All Share Index	10,738.31	0.1	2.5	18.3	21.9	2.2	2.2	3.42%
Dubai Financial Market General Index	3,879.92	(1.5)	16.3	9.0	12.3	1.3	1.0	4.78%
FTSE ADX GENERAL INDEX	9,500.99	(0.6)	(7.0)	30.8	19.8	2.9	2.0	1.66%
Qatar Exchange Index	9,954.96	(0.8)	(6.8)	12.6	13.0	1.3	1.5	4.89%
Bahrain Bourse All Share Index	1,940.93	(0.3)	2.4	17.3	12.5	1.4	1.0	8.63%
Boursa Kuwait All Share Price Return Ir	6,744.91	(1.1)	(7.5)	15.9	20.3	1.5	1.5	4.16%

Tadawul Index is updated till 3:00 PM Muscat Time

Asia	Price Momentum			T12M Price to Earnings		T12M Price to Book		Dividend Yield %
	Last price	% Chg, 1 Day	% chg, YTD	Last	5 Year Avg TTM P/E	TTM P/B	5 Year Avg TTM P/B	
MSCI AC Asia Pacific Excluding Japan Ir	491.72	0.6	(2.8)	15.3	16.7	1.5	1.7	2.93%
MSCI AC Asia Ex. Japan Index	605.11	0.5	(2.3)	15.4	16.3	1.4	1.6	0.00%
Nikkei 225	32,042.25	0.0	22.8	25.5	24.2	1.8	1.8	1.79%
S&P/ASX 200	7,077.61	0.3	0.6	16.0	19.1	2.1	2.2	4.26%
Hang Seng Index	17,732.52	(0.2)	(10.4)	9.9	11.2	1.0	1.1	4.01%
NSE Nifty 50 Index	19,671.10	(0.7)	8.6	24.0	25.2	3.1	3.1	1.41%

Europe	Price Momentum			T12M Price to Earnings		T12M Price to Book		Dividend Yield %
	Last price	% Chg, 1 Day	% chg, YTD	Last	5 Year Avg TTM P/E	TTM P/B	5 Year Avg TTM P/B	
MSCI Europe Index	151.36	(0.1)	6.2	13.0	16.6	1.8	1.7	3.56%
MSCI Emerging Markets Europe Index	108.30	1.7	15.6	5.6	7.0	1.2	0.9	3.69%
FTSE 100 Index	7,624.79	(0.7)	2.3	11.2	14.6	1.8	1.6	3.97%
Deutsche Boerse AG German Stock Inc	15,151.95	(0.7)	8.8	12.3	16.0	1.4	1.6	3.85%
CAC 40 Index	6,985.15	(0.6)	7.9	12.1	16.9	1.7	1.6	3.35%

America's	Price Momentum			T12M Price to Earnings		T12M Price to Book		Dividend Yield %
	Last price	% Chg, 1 Day	% chg, YTD	Last	5 Year Avg TTM P/E	TTM P/B	5 Year Avg TTM P/B	
MSCI North America Index	4,337.45	0.0	13.8	21.7	22.2	4.0	3.8	1.63%
S&P 500 INDEX	4,373.20	(0.0)	13.9	21.4	22.5	4.2	4.0	1.58%
Dow Jones Industrial Average	33,997.65	0.0	2.6	20.5	20.1	4.4	4.5	2.13%
NASDAQ Composite Index	13,533.75	(0.3)	29.3	37.9	36.4	5.5	5.3	0.80%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	591.40	0.0	-3.1	-28%	159%
Gold Spot \$/Oz	1,945.64	1.2	6.7	-6%	85%
BRENT CRUDE FUTR Dec23	92.38	2.8	13.1	-6%	112%
Generic 1st'OQA' Future	93.24	2.4	18.1	-26%	405%
LME COPPER 3MO (\$)	7,970.50	-0.1	-4.8	-25%	84%
SILVER SPOT \$/OZ	23.21	1.7	-3.1	-20%	94%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,704.13							
Change	-19.34	-0.41%						
Previous Close	4,723.47		Financial Sector	7,666.81	7,744.14	-1.00%	0.22%	-2.99%
Open	4,723.47		Industry Sector	5,540.31	5,519.73	0.37%	-2.03%	-13.80%
Day's High	4,737.86		Services Sector	1,626.62	1,631.60	-0.31%	-0.18%	0.62%
Day's Low	4,704.13		MSM Shariah Index	461.25	459.72	33.00%	-	-
YTD Change	-3.16%							
Volume Mn	7.16							
MSX30 Value Traded Mn	3.33							
Traded / Listed Stocks	34	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
GULF MUSHROOM PRODUCTS	0.230	3.60%	MUSANDAM POWER	0.260	-7.80%	BANK MUSCAT PER.	0.770	3042.66
PHOENIX POWER	0.060	3.45%	OMAN ARAB BANK	0.139	-6.08%	BANK MUSCAT	0.269	2045.98
BARKA WATER AND POWER	0.040	2.56%	GLOBAL FINANCIAL INVESTMENT HO.	0.059	-4.84%	BANK DHOFAR	0.175	500.00
MUSCAT CITY DESALINATION	0.083	2.47%	RENAISSANCE SERVICES	0.400	-4.08%	SOHAR INTERNATIO	0.105	482.70
ASAFFA FOODS	0.296	2.07%	BANK MUSCAT	0.269	-2.89%	OMAN TELECOM	1.018	237.00

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,738.31		Tadawul Banks	10,019.62	10,030.86	-0.11%	0.99%	-3.41%
Change	6.91	0.06%	Tadawul Energy	6,262.12	6,271.31	-0.15%	-0.76%	-4.63%
Previous Close	10,731.40		Tadawul Utilities	8,932.12	8,585.72	4.03%	13.09%	9.35%
Open	10,729.80		Tadawul Telecom	7,102.17	7,073.69	0.40%	4.46%	-0.21%
Day's High	10,784.32		Tadawul Insurance	8,071.74	8,189.36	-1.44%	2.05%	-1.49%
Day's Low	10,687.15		Tadawul Retailing	7,849.54	7,874.73	-0.32%	0.15%	0.78%
YTD Change	2.48%		Tadawul Food & Beverages	5,494.29	5,499.22	-0.09%	1.40%	-5.59%
Volume Mn	194,340.25		Tadawul Media	22,167.87	22,466.39	-1.33%	0.29%	-3.13%
Value Traded Mn	5,113.01		Tadawul Materials	5,951.18	6,021.79	-1.17%	-1.14%	-4.25%
Traded / Listed Stocks	229	228	Tadawul Capital Goods	7,652.87	7,611.82	0.54%	4.03%	1.40%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
ACWA POWER CO	233	6.30%	RAOOM TRADING CO	110.60	-7.06%	AL-BAHA DEVELOPMI	0.14	13449.92
ETIHAD ATHEEB TELECOMMUNICAT	139.6	6.24%	SAUDI PARTS CENTER CO	60.00	-6.25%	SAUDI ARABIAN OIL (33.40	8331.58
LEEJAM SPORTS CO JSC	154.2	5.47%	SAHARA INTERNATIONAL PETROCH	33.80	-5.06%	SAHARA INTERNATIO	33.80	4520.65
SEERA GROUP HOLDING	23.62	5.17%	AL JOUF MINERAL WATER BOTTLI	29.00	-3.17%	SAUDI INVESTMENT I	14.64	4141.30
ASTRA INDUSTRIAL GROUP	93.6	4.00%	AL RAJHI CO FOR CO-OPERATIVE	146.80	-3.04%	TOURISM ENTERPRIS	0.65	4113.32

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	3,879.92							
Change	-57.54	-1.46%						
Previous Close	3,937.46		Real Estate & Construction	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Open	3,940.20		Banking	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	3,951.96		Insurance	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	3,876.90		Consumer Staples	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.16		Services	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Industrial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	175,789.21		Telecommunication	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	383.56		Transportation	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Traded / Listed Stocks	35	50						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
AL FIRDOUS HOLDINGS PJSC	0.428	14.75%	NATIONAL GENERAL INSURANCE	2.88	-9.72%	UNION PROPERTIES F	0.33	42,855.55
DUBAI ISLAMIC BANK	5.47	1.11%	DUBAI ISLAMIC INSURANCE CO	0.43	-5.49%	EMAAR PROPERTIES I	6.84	24,417.43
-	-	-	UNION PROPERTIES PJSC	0.329	-4.91%	SHUAA CAPITAL PSC	0.24	16,204.12
-	-	-	SHUAA CAPITAL PSC	0.24	-4.00%	AL FIRDOUS HOLDING	0.43	13,388.50
-	-	-	BHM CAPITAL FINANCIAL SERVIC	1.44	-4.00%	DUBAI ELECTRICITY &	2.42	5,074.56

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,500.99							
Change	-52.60	-0.55%						
Previous Close	9,553.59		Financial	16,333.16	16,373.86	-0.25%	0.01%	-1.30%
Open	9,553.59		Telecommunication	4,843.43	4,812.85	0.64%	3.71%	-4.57%
Day's High	9,553.59		Consumer Services	9,523.20	9,663.65	-1.45%	-2.21%	-2.21%
Day's Low	9,481.88		Basic Material	5,267.14	5,335.78	-1.29%	-0.27%	-3.41%
YTD Change	-6.95%		Industrials	3,122.69	3,202.95	-2.51%	0.58%	-5.27%
			Utilities	12,170.87	12,646.60	-3.76%	-4.66%	-12.29%
Volume Mn	116,478.65		Energy	2,004.48	2,047.11	-2.08%	-1.02%	-8.26%
Value Traded Mn	803.30		Health Care	3,474.79	3,487.89	-0.38%	-1.25%	-8.32%
Traded / Listed Stocks	69	84	Real Estate	7,994.17	8,218.25	-2.73%	-2.44%	-8.81%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
HAYAH INSURANCE CO PJSC	1.14	6.54%	RAS AL KHAIMA POULTRY	1.64	-9.39%	MULTIPLY GROUP	3.52	24482.63
UNITED ARAB BANK PJSC	1.24	2.48%	ABU DHABI NATL CO FOR BUILDI	0.265	-7.67%	Q HOLDING PJSC	2.96	16608.63
ABU DHABI ISLAMIC BANK	10.88	2.06%	Q HOLDING PJSC	2.96	-6.33%	RAK PROPERTIES	1.00	10520.11
RESPONSE PLUS HOLDING PJSC	4.14	1.47%	ADNOC DRILLING CO PJSC	3.55	-5.33%	FIRST ABU DHABI BAI	13.36	9621.19
FUJAIRAH CEMENT INDUSTRIES	0.324	0.93%	EASY LEASE MOTOR CYCLE PRJSC	28.94	-4.80%	MANAZEL REAL ESTA'	0.36	7714.82

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,954.96							
Change	-78.98	-0.79%	Total Return	21,364.74	21,534.24	-0.79%	-1.63%	-2.90%
Previous Close	10033.94		Rayan Islamic	4,357.80	4,406.14	-1.10%	-1.49%	-4.09%
Open	10033.94		All Share	3,363.33	3,385.87	-0.67%	-1.70%	-2.72%
			Banks & Finance	4,065.47	4,071.80	-0.16%	-2.07%	-1.44%
Day's High	10055.27		Industrials	4,092.30	4,134.46	-1.02%	-0.19%	-2.57%
Day's Low	9903.95		Transportation	4,286.28	4,367.21	-1.85%	-3.28%	-5.19%
YTD Change	-0.06798105		Real Estate	1,368.41	1,396.02	-1.98%	-2.57%	-6.61%
			Insurance	2,495.74	2,538.61	-1.69%	-1.84%	-6.42%
Volume Mn	152.405		Telecommunications	1,513.42	1,519.31	-0.39%	-1.59%	-5.53%
Value Traded Mn	434.8092		Consumer Goods	7,362.65	7,428.37	-0.88%	-1.80%	-3.58%
Traded / Listed Stocks	20	51						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
QATAR NATIONAL BANK	15.72	1.55%	QATARI INVESTORS GROUP	1.55	-6.65%	MASRAF AL RAYAN	2.07	14362.97
QATAR ELECTRICITY & WATER CO	17.40	1.05%	ALIJARAH HOLDING COMPANY QPS	0.69	-5.38%	DOHA BANK QPSC	1.44	11176.14
COMMERCIAL BANK PSQC	5.33	0.62%	DLALA HOLDING	1.37	-4.85%	QATAR ALUMINIUM M	1.31	10590.32
VODAFONE QATAR	1.80	0.39%	QATAR INDUSTRIAL MANUFACTUR	2.95	-4.81%	MAZAYA REAL ESTAT	0.61	10126.05
ZAD HOLDING CO	13.94	0.07%	MAZAYA REAL ESTATE DEVELOPME	0.61	-4.22%	GULF INTERNATIONA	2.78	8533.99

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,940.93							
Change	-5.09	-0.26%	MSCI Bahrain	140.76	139.78	0.70%	0.21%	0.33%
Previous Close	1,946.02		MSCI Bahrain Domestic Islamic	51.89	51.28	1.17%	0.01%	1.56%
Open	1,946.02		MSCI Bahrain Net TR USD	365.13	362.58	0.70%	0.20%	0.32%
Day's High	1947.990							
Day's Low	1940.930							
YTD Change	2.41%							
Volume Mn	1,967.31							
Value Traded Mn	0.314							
Traded / Listed Stocks	42	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
APM TERMINALS BAHRAIN BSC	0.97	2.11%	NASS CORP BSC	0.10	-3.85%	AL SALAM BANK BSC	0.18	617.50
-	-	-	ARAB BANKING CORP BSC-\$US	0.27	-3.21%	ARAB BANKING CORP	0.27	200.00
-	-	-	AL SALAM BANK BSC	0.18	-1.09%	NASS CORP BSC	0.10	100.00
-	-	-	ALUMINIUM BAHRAIN BSC	1.12	-0.53%	ALUMINIUM BAHRAI	1.12	17.34
-	-	-	-	-	-	APM TERMINALS BAH	0.97	14.70

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Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	6,744.91							
Change	-77.62	-1.14%	Industrials	891.84	902.00	-1.13%	-3.07%	-17.34%
Previous Close	6,822.53		Banks	1,637.91	1,662.33	-1.47%	-2.53%	-8.70%
Open	6,849.03		Consumer Service	578.84	585.00	-1.05%	-2.88%	20.60%
			Technology	541.26	632.92	-14.48%	-2.62%	-22.26%
Day's High	6,872.79		Real Estate	1,181.45	1,184.23	-0.23%	0.50%	-2.26%
Day's Low	6,737.43		Financial Services	1,211.39	1,221.42	-0.82%	-2.18%	-3.65%
YTD Change	-7.50%		Telecom	1,089.10	1,092.32	-0.29%	1.57%	-7.82%
			Health Care	469.66	469.66	0.00%	-1.15%	1.69%
Volume Mn	0.17		Insurance	2,224.47	2,224.09	0.02%	0.15%	43.44%
Value Traded Mn	55.51		Basic Materials	788.65	801.28	-1.58%	-5.33%	-8.84%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
ENERGY HOUSE HOLDING CO KSCP	52.80	10.00%	AUTOMATED SYSTEMS CO KSCC	74.40	-14.48%	KUWAIT FINANCE HO	720.00	31548.71
KUWAIT HOTELS SAK	205.00	8.47%	IFA HOTELS & RESORTS CO. K.S	292.00	-7.01%	EKTTITAB HOLDING C	19.90	9946.05
INDEPENDENT PETROLEUM GROUP	448.00	7.95%	SULTAN CENTER FOOD PRODUCTS	100.60	-5.98%	AAYAN LEASING & IN	155.00	9483.51
KUWAIT INVESTMENT CO	133.00	5.56%	SANAM REAL ESTATE CO KSCC	169.00	-5.59%	MOBILE TELECOMML	499.00	7660.50
WARBA CAPITAL HOLDING CO	126.00	5.00%	MUBARRAD HOLDING CO KSC	80.20	-5.42%	KUWAIT INTERNATIO	154.00	7259.59

Source: FSC

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