

Financial Services Company GCC Daily Report

29-Nov-23

2023

Research Department

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FSC Daily Report

29/11/2023



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	3,012.57	0.2	15.7	19.1	20.2	2.9	2.7	2.04%
MSCI Emerging Markets Index	985.47	0.8	3.0	14.6	14.8	1.5	1.6	2.89%
MSCI FM FRONTIER MARKETS	492.79	0.5	4.3	10.6	12.9	1.5	1.8	4.19%

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	515.36	0.5	(7.7)	10.7	14.5	1.5	1.7	3.83%
Muscat Stock Exchange MSX 30 Index	4,654.62	0.5	(4.2)	14.2	11.5	0.9	0.8	4.74%
Tadawul All Share Index	11,091.69	(0.1)	5.9	18.8	21.9	2.2	2.2	3.15%
Dubai Financial Market General Index	3,998.24	(0.3)	19.8	8.8	12.3	1.3	1.0	4.47%
FTSE ADX GENERAL INDEX	9,531.75	(0.1)	(6.7)	27.1	20.2	3.0	2.0	1.64%
Qatar Exchange Index	9,991.81	(0.2)	(6.5)	11.9	12.8	1.3	1.5	4.87%
Bahrain Bourse All Share Index	1,942.89	(0.4)	2.5	7.0	11.8	0.7	1.0	8.62%
Boursa Kuwait All Share Price Return Ir	6,603.46	(0.5)	(9.4)	13.9	20.3	1.4	1.5	4.25%

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	505.40	0.7	(0.0)	15.8	16.6	1.5	1.7	2.97%
MSCI AC Asia Ex. Japan Index	620.53	0.7	0.2	15.9	16.3	1.5	1.6	0.00%
Nikkei 225	33,321.22	(0.3)	27.7	27.5	24.4	1.9	1.8	1.83%
S&P/ASX 200	7,035.35	0.3	(0.0)	15.6	19.0	2.0	2.1	4.27%
Hang Seng Index	16,993.44	(2.1)	(14.1)	9.6	11.3	1.0	1.1	4.12%
NSE Nifty 50 Index	20,096.60	1.0	11.0	23.0	24.7	2.8	2.9	1.40%

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	153.37	(0.3)	7.6	13.0	16.5	1.7	1.7	3.49%
MSCI Emerging Markets Europe Index	116.36	1.6	24.2	5.9	7.0	1.2	0.9	3.71%
FTSE 100 Index	7,448.51	(0.1)	(0.0)	10.9	14.4	1.7	1.6	4.06%
Deutsche Boerse AG German Stock Inc	16,149.55	1.0	16.0	13.5	15.8	1.4	1.6	3.61%
CAC 40 Index	7,284.28	0.5	12.5	12.6	16.9	1.7	1.6	3.22%

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	4,514.82	0.1	18.4	22.0	22.3	4.1	3.8	1.58%
S&P 500 INDEX	4,554.89	0.1	18.6	21.8	22.1	4.3	4.0	1.53%
Dow Jones Industrial Average	35,416.98	0.2	6.8	20.8	19.5	4.5	4.4	2.05%
NASDAQ Composite Index	14,281.76	0.3	36.5	36.1	36.8	5.7	5.4	0.76%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	558.48	1.6	-8.5	-32%	145%
Gold Spot \$/Oz	2,037.87	-0.2	11.7	-1%	94%
BRENT CRUDE FUTR Jan24	82.51	1.0	1.6	-15%	89%
Generic 1st'OQA' Future	80.76	-2.5	2.3	-36%	337%
LME COPPER 3MO (\$)	8,473.00	1.3	1.2	-21%	96%
SILVER SPOT \$/OZ	24.93	-0.4	4.1	-14%	108%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,654.62							
Change	21.82	0.47%						
Previous Close	4,632.80		Financial Sector	7,570.57	7,541.32	0.39%	2.15%	-4.21%
Open	4,632.80		Industry Sector	5,395.89	5,358.56	0.70%	-0.75%	-16.05%
Day's High	4,658.50		Services Sector	1,589.57	1,587.16	0.15%	-0.08%	-1.67%
Day's Low	4,626.23		MSM Shariah Index	445.84	439.39	146.70%	-	-
YTD Change	-4.18%							
Volume Mn	15.82							
MSX30 Value Traded Mn	3.72							
Traded / Listed Stocks	44	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
THE PEARL REIF	0.132	10.00%	TAAGEER FINANCE	0.095	-4.04%	OQ GAS NETWORKS	0.153	3145.17
TAKAFUL OMAN	0.048	9.09%	OMAN EMIRATES HO.	0.053	-3.64%	BANK MUSCAT	0.275	2954.77
SHARQIYAH DESALINATION	0.130	5.69%	MUSCAT CITY DESALINATION	0.078	-2.50%	SOHAR INTERNATIO	0.100	2717.08
ALMAHA CERAMICS	0.225	4.65%	MUSCAT GASES	0.098	-2.00%	BANK NIZWA	0.095	2360.07
DHOFAR INSURANCE	0.235	4.44%	AL ANWAR CERAMIC	0.175	-1.69%	OMAN TELECOM	1.085	1330.74

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,091.69		Tadawul Banks	10,850.99	10,880.96	-0.28%	0.09%	6.47%
Change	-9.23	-0.08%	Tadawul Energy	6,242.59	6,232.75	0.16%	-0.22%	0.11%
Previous Close	11,100.92		Tadawul Utilities	8,752.64	8,781.46	-0.33%	-0.37%	-0.25%
Open	11,140.39		Tadawul Telecom	7,319.58	7,345.91	-0.36%	-0.30%	0.03%
Day's High	11,145.98		Tadawul Insurance	7,923.31	7,940.74	-0.22%	-0.55%	-0.77%
Day's Low	11,072.40		Tadawul Retailing	7,603.27	7,571.94	0.41%	-0.82%	0.42%
YTD Change	5.85%		Tadawul Food & Beverages	5,429.46	5,413.65	0.29%	0.13%	1.61%
Volume Mn	184,032.44		Tadawul Media	21,561.43	22,084.91	-2.37%	4.52%	5.46%
Value Traded Mn	4,698.18		Tadawul Materials	5,932.73	5,921.47	0.19%	-0.60%	3.49%
Traded / Listed Stocks	228	228	Tadawul Capital Goods	8,474.19	8,382.26	1.10%	2.77%	12.93%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SAUDI PARTS CENTER CO	71	10.76%	NATIONAL BUILDING AND MARKET	225.00	-6.25%	TOURISM ENTERPRIS	0.63	38944.00
ANAAM INTERNATIONAL HOLDING	0.96	9.09%	MOHAMMED HASAN AL NAQOOL SON	52.30	-4.21%	ANAAM INTERNATIO	0.96	32103.48
AL-BAHA DEVELOPMENT & INVEST	0.15	7.14%	SAUDI RESEARCH & MEDIA GROUP	159.00	-3.40%	AL-BAHA DEVELOPMI	0.15	16051.91
SAUDI PHARMACEUTICAL INDUSTR	37.05	7.09%	DALLAH HEALTHCARE CO	165.00	-2.02%	SAUDI ARABIAN OIL C	33.30	6043.75
SAUDI FISHERIES	24.26	5.30%	ARABIAN INTERNATIONAL HEALTH	39.20	-2.00%	ARAB SEA INFORMAT	7.06	2973.42

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	3,998.24							
Change	-10.37	-0.26%						
Previous Close	4,008.61		Real Estate & Construction	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
Open	4,008.61		Banking	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
			Investment and Financial	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
Day's High	4,020.63		Insurance	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
Day's Low	3,993.68		Consumer Staples	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
YTD Change	0.20		Services	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
			Industrial	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
Volume Mn	114,321.60		Telecommunication	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
Value Traded Mn	408.43		Transportation	RD/A/N/A	RD/A/N/A	RD/ALDEI	RD/ALDEI	RD/ALDEI
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
DUBAI REFRESHMENTS COMPANY	19.5	8.33%	DUBAI NATIONAL INSURANCE	4.75	-5.00%	UNION PROPERTIES F	0.32	14,117.00
EMAAR PROPERTIES PJSC	7.44	1.50%	ARAMEX PJSC	2.04	-3.77%	DUBAI ELECTRICITY &	2.55	13,989.47
EMAAR DEVELOPMENT PJSC	6.9	1.32%	TAKAFUL EMARAT INSURANCE	0.43	-2.27%	EMAAR PROPERTIES I	7.44	9,445.17
DUBAI ELECTRICITY & WATER AU	2.55	0.79%	ISLAMIC ARAB INSURANCE COM	0.54	-2.17%	ARAMEX PJSC	2.04	8,402.24
AMLAK FINANCE	0.79	0.25%	MASHREQBANK	153	-1.29%	GULF NAVIGATION H	7.01	3,426.79

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,531.75							
Change	-9.38	-0.10%						
Previous Close	9,541.13		Financial	16,328.36	16,350.22	-0.13%	-0.10%	1.20%
Open	9,541.13		Telecommunication	4,775.88	4,771.73	0.09%	-1.44%	4.00%
Day's High	9,544.27		Consumer Services	10,183.38	10,146.19	0.37%	-0.20%	9.94%
Day's Low	9,522.50		Basic Material	5,087.95	5,107.32	-0.38%	0.08%	-0.52%
YTD Change	-6.65%		Industrials	3,272.12	3,248.26	0.73%	0.65%	6.22%
			Utilities	12,805.18	12,924.12	-0.92%	-0.62%	6.95%
Volume Mn	221,187.20		Energy	2,073.31	2,075.47	-0.10%	-0.12%	4.37%
Value Traded Mn	968.99		Health Care	4,085.36	4,111.09	-0.63%	-2.45%	11.83%
Traded / Listed Stocks	68	84	Real Estate	8,517.39	8,515.68	0.02%	-0.94%	7.42%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
GHITHA HOLDING PJSC	41.68	5.52%	FOODCO NATIONAL FOODSTUFF CO	1.65	-9.84%	MULTIPLY GROUP	3.50	19415.85
ALKHALEEJ INVESTMENT	1.5	3.45%	SHARJAH INSURANCE COMPANY	1.35	-9.40%	BOROUGE	2.52	14492.17
ABU DHABI NATL CO FOR BUILDI	0.257	2.80%	HAYAH INSURANCE CO PJSC	1.28	-3.76%	ALDAR PROPERTIES P	5.66	8263.64
ALPHA DHABI HOLDING PJSC	19.4	1.46%	ESG EMIRATES STALLIONS GROU	6	-2.28%	Q HOLDING PJSC	3.23	7549.28
RAS AL KHAIMAH CERAMICS	2.51	1.21%	NATIONAL CORP TOURISM & HOTE	2.81	-2.09%	FIRST ABU DHABI BAI	13.58	5757.94

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,991.81							
Change	-15.40	-0.15%	Total Return	21,443.83	21,476.88	-0.15%	-2.12%	4.92%
Previous Close	10007.21		Rayan Islamic	4,426.99	4,432.02	-0.11%	-2.24%	5.86%
Open	10007.21		All Share	3,373.58	3,375.13	-0.05%	-1.73%	4.49%
			Banks & Finance	4,216.12	4,213.57	0.06%	-0.87%	7.33%
Day's High	10031.4		Industrials	3,867.91	3,873.82	-0.15%	-3.72%	1.77%
Day's Low	9961.9		Transportation	4,060.60	4,099.01	-0.94%	-3.55%	-2.03%
YTD Change	-0.06453106		Real Estate	1,432.53	1,433.04	-0.04%	-0.77%	5.77%
			Insurance	2,443.19	2,446.71	-0.14%	-0.99%	-2.50%
Volume Mn	113.669		Telecommunications	1,526.76	1,520.32	0.42%	-1.37%	1.34%
Value Traded Mn	364.9973		Consumer Goods	7,300.72	7,292.60	0.11%	-1.12%	4.83%
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
VODAFONE QATAR	1.83	1.67%	AL FALEH EDUCATION HOLDING	0.81	-3.69%	MASRAF AL RAYAN	2.50	10403.93
ESTITHMAR HOLDING QPSC	2.00	1.37%	QATAR ISLAMIC INSURANCE GROU	8.80	-2.19%	GULF INTERNATIONAL	2.69	9068.52
GULF INTERNATIONAL SERVICES	2.69	0.90%	DOHA BANK QPSC	1.60	-1.42%	MAZAYA REAL ESTAT	0.66	8119.47
QATAR GENERAL INSURANCE & RE	1.21	0.75%	COMMERCIAL BANK PSQC	5.31	-1.30%	QATAR ALUMINUM A	1.26	8089.68
MANNAI CORPORATION QSC	3.84	0.73%	WIDAM FOOD CO	2.26	-1.05%	QATAR GAS TRANSPC	3.20	7538.88

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,942.89							
Change	-8.56	-0.44%	MSCI Bahrain	141.93	142.16	-0.16%	-0.64%	2.24%
Previous Close	1,951.45		MSCI Bahrain Domestic Islamic	52.44	52.48	-0.07%	-0.80%	3.45%
Open	1,952.11		MSCI Bahrain Net TR USD	368.18	368.79	-0.16%	-0.65%	2.25%
Day's High	1952.570							
Day's Low	1942.890							
YTD Change	2.51%							
Volume Mn	554.13							
Value Traded Mn	0.267							
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	1.10	1.85%	ALUMINIUM BAHRAIN BSC	1.08	-1.82%	AL SALAM BANK BSC	0.20	1066.22
-	-	-	AL SALAM BANK BSC	0.20	-0.50%	ALUMINIUM BAHRAII	1.08	182.09
-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.59	-0.34%	ZAIN BAHRAIN BSCC	0.13	100.00
-	-	-	-	-	-	NATIONAL BANK OF B	0.59	25.18
-	-	-	-	-	-	APM TERMINALS BAH	1.10	13.31

Source: FSC

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Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	6,603.46							
Change	-35.19	-0.53%	Industrials	896.22	903.78	-0.84%	1.01%	-16.93%
Previous Close	6,638.65		Banks	1,584.27	1,591.95	-0.48%	0.44%	-11.69%
Open	6,640.56		Consumer Service	587.71	591.82	-0.69%	0.46%	22.45%
			Technology	609.64	609.64	0.00%	0.96%	-12.44%
Day's High	6,650.37		Real Estate	1,186.69	1,192.91	-0.52%	2.98%	-1.82%
Day's Low	6,588.87		Financial Services	1,191.76	1,208.39	-1.38%	3.12%	-5.21%
YTD Change	-9.44%		Telecom	1,088.44	1,088.17	0.02%	3.34%	-7.87%
			Health Care	482.15	469.74	2.64%	3.11%	4.40%
Volume Mn	0.23		Insurance	2,203.14	2,223.51	-0.92%	-1.55%	42.06%
Value Traded Mn	56.80		Basic Materials	768.69	772.52	-0.50%	1.49%	-11.15%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
ADVANCED TECHNOLOGY CO	469.00	9.58%	FIRST TAKAFUL INSURANCE CO	57.00	-12.17%	GULF BANK	255.00	27747.43
AL-DEERA HOLDING CO	275.00	6.18%	UNICAP INVESTMENT AND FINANC	61.90	-8.97%	INTL FINANCIAL ADVI	278.00	21825.14
NATIONAL PETROLEUM SERVICES	740.00	3.79%	AL MASAKEN INTL REAL ESTATE	24.50	-7.55%	ARZAN FINANCIAL GF	195.00	14085.14
AL-MASSALEH REAL ESTATE CO	27.00	3.45%	BURGAN CO FOR WELL DRILLING	89.80	-7.33%	NATIONAL INTERNAT	113.00	11368.82
IFA HOTELS & RESORTS CO. K.S	548.00	2.43%	KUWAIT FOUNDRY CO SAK	405.00	-5.81%	AL SAFAT INVESTMEP	104.00	10531.16

Source: FSC