

## Financial Services Company GCC Daily Report

17-Jul-23

2023

### Research Department

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# FSC Daily Report

17/07/2023



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	3,017.94	(0.1)	16.0	19.1	20.1	3.0	2.7	2.07%
MSCI Emerging Markets Index	1,028.49	0.8	7.5	13.4	14.8	1.6	1.6	2.88%
MSCI FM FRONTIER MARKETS	503.38	0.4	6.6	9.5	13.2	1.6	1.8	4.45%

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	539.60	(0.1)	(3.4)	12.9	14.7	1.6	1.7	3.58%
Muscat Stock Exchange MSX 30 Index	4,757.65	(0.2)	(2.1)	12.8	10.9	0.7	0.8	4.57%
Tadawul All Share Index	11,746.63	0.3	12.1	18.4	21.7	2.3	2.1	2.89%
Dubai Financial Market General Index	4,014.17	0.1	20.3	9.7	12.2	1.3	1.0	4.39%
FTSE ADX GENERAL INDEX	9,662.16	(0.1)	(5.4)	32.4	18.8	3.0	1.9	1.74%
Qatar Exchange Index	10,280.37	0.5	(3.8)	12.3	14.8	1.4	1.5	4.81%
Bahrain Bourse All Share Index	1,980.36	0.0	4.5	7.0	11.9	0.7	1.0	7.72%
Boursa Kuwait All Share Price Return Ir	7,287.09	(0.3)	(0.1)	18.0	20.3	1.6	1.5	3.63%

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	534.76	0.9	5.8	15.2	16.6	1.6	1.7	2.92%
MSCI AC Asia Ex. Japan Index	656.06	1.0	5.9	15.4	16.3	1.5	1.6	0.00%
Nikkei 225	32,391.26	(0.1)	24.1	31.5	23.6	2.0	1.8	1.88%
S&P/ASX 200	7,298.51	(0.1)	3.7	14.9	19.1	2.1	2.1	4.48%
Hang Seng Index	19,413.78	0.3	(1.9)	9.9	11.5	1.1	1.1	3.71%
NSE Nifty 50 Index	19,711.45	0.8	8.9	23.5	24.8	3.5	2.9	1.35%

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	154.76	(0.1)	8.6	13.5	16.7	1.7	1.7	3.47%
MSCI Emerging Markets Europe Index	110.56	0.6	18.0	5.2	7.0	1.2	0.9	3.82%
FTSE 100 Index	7,415.23	(0.3)	(0.5)	10.3	14.8	1.6	1.6	4.25%
Deutsche Boerse AG German Stock Inc	16,027.88	(0.5)	15.1	13.2	15.9	1.4	1.6	3.63%
CAC 40 Index	7,283.72	(1.2)	12.5	12.7	17.0	1.7	1.6	3.21%

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	4,471.60	(0.1)	17.3	21.6	22.1	4.2	3.8	1.59%
S&P 500 INDEX	4,505.42	(0.1)	17.3	21.6	21.9	4.4	3.9	1.54%
Dow Jones Industrial Average	34,509.03	0.3	4.1	20.0	19.2	4.5	4.4	2.07%
NASDAQ Composite Index	14,113.70	(0.2)	34.8	40.1	35.4	5.8	5.3	0.77%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	562.52	-0.5	-7.8	-32%	146%
Gold Spot \$/Oz	1,956.86	0.1	7.3	-5%	86%
BRENT CRUDE FUTR Sep23	78.73	-1.4	-5.3	-22%	83%
Generic 1st'OQA' Future	79.78	-1.1	1.1	-37%	332%
LME COPPER 3MO (\$)	8,673.50	-0.2	3.6	-19%	100%
SILVER SPOT \$/OZ	24.80	-0.6	3.5	-15%	107%

Source: FSC

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### Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,757.65							
Change	-11.90	-0.25%						
Previous Close	4,769.54		Financial Sector	7,849.20	7,871.55	-0.28%	0.24%	-0.69%
Open	4,769.54		Industry Sector	6,120.22	6,104.66	0.25%	-0.41%	-4.78%
Day's High	4,769.98		Services Sector	1,676.77	1,688.33	-0.69%	-1.09%	3.72%
Day's Low	4,757.65		MSM Shariah Index	470.06	469.56	11.00%	-	-
YTD Change	-2.05%							
Volume Mn	7.10							
MSX30 Value Traded Mn	2.71							
Traded / Listed Stocks	43	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
CONSTRUCTION MATERIAL INDUSTRI	0.063	8.62%	MUSCAT INSURANCE	0.380	-9.52%	ALANWAR INVESTM	0.088	1223.18
OMAN FLOUR MILLS	0.550	4.96%	FINANCIAL CORPORATION	0.061	-6.15%	BANK MUSCAT	0.280	1171.02
TAAGEER FINANCE	0.095	3.26%	VOLTAMP ENERGY	0.128	-4.48%	GALFAR ENGINEERII	0.168	753.65
OMAN CHROMITE	3.880	1.81%	PHOENIX POWER	0.064	-4.48%	OMAN FLOUR MILLS	0.550	672.64
OMAN CEMENT	0.363	0.83%	GALFAR ENGINEERING & CONTRACTING	0.168	-3.45%	ABRAJ ENERGY SERV	0.304	479.55

### Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,746.63		Tadawul Banks	11,561.38	11,516.79	0.39%	0.47%	2.51%
Change	31.13	0.27%	Tadawul Energy	6,035.36	6,035.02	0.01%	0.01%	-0.26%
Previous Close	11,715.50		Tadawul Utilities	8,620.56	8,534.79	1.00%	2.20%	10.77%
Open	11,713.39		Tadawul Telecom	8,170.71	8,188.79	-0.22%	-0.04%	2.29%
Day's High	11,750.52		Tadawul Insurance	8,008.48	7,892.90	1.46%	1.41%	6.43%
Day's Low	11,671.15		Tadawul Retailing	8,426.34	8,392.26	0.41%	-0.60%	1.67%
YTD Change	12.10%		Tadawul Food & Beverages	6,262.47	6,128.77	2.18%	0.62%	5.48%
Volume Mn	263,667.22		Tadawul Media	24,061.08	24,057.71	0.01%	3.04%	-1.30%
Value Traded Mn	5,531.39		Tadawul Materials	6,637.41	6,671.78	-0.52%	-0.80%	0.19%
Traded / Listed Stocks	223	228	Tadawul Capital Goods	7,783.49	7,840.71	-0.73%	-0.65%	2.47%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
ALWASAIL INDUSTRIAL CO	25	6.38%	NATIONAL ENVIORNMENTAL RECYC	8.51	-5.44%	AL-BAHA DEVELOPMI	0.18	26349.25
SAUDI PARTS CENTER CO	68	6.25%	GROUP FIVE PIPE SAUDI LTD	21.50	-2.71%	TOURISM ENTERPRIS	0.81	13930.78
MALATH INSURANCE	22.92	6.11%	ARABIAN INTERNET & COMMUNICA	367.80	-2.44%	ANAAM INTERNATIO	1.21	7219.35
CO FOR COOPERATIVE INSURANCE	157	3.97%	BAWAN CO	36.65	-2.27%	DAR AL ARKAN REAL	16.36	5679.89
SASCO	62.4	3.83%	ELM CO	633.40	-2.26%	ALINMA BANK	36.10	4469.17

Source: FSC

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## Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,014.17							
Change	4.34	0.11%						
Previous Close	4,009.83		<b>Real Estate &amp; Construction</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Open	4,010.74		<b>Banking</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			<b>Investment and Financial</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	4,018.81		<b>Insurance</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	3,994.24		<b>Consumer Staples</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.20		<b>Services</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			<b>Industrial</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	146,710.58		<b>Telecommunication</b>	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	214.27		<b>Transportation</b>	#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
AMLAK FINANCE	0.961	14.95%	AL FIRDOUS HOLDINGS PJSC	0.755	-6.91%	UNION PROPERTIES F	0.43	88,038.97
AL RAMZ CORPORATION INVESTME	1.42	13.60%	COMMERCIAL BANK OF DUBAI	4.71	-1.88%	DEYAAR DEVELOPME	0.74	53,122.24
DEYAAR DEVELOPMENT PJSC	0.739	4.23%	EMIRATES INTEGRATED TELECOMM	5.45	-1.45%	AMLAK FINANCE	0.96	51,482.86
AMANAT HOLDINGS PJSC	1.05	1.94%	DUBAI ISLAMIC INSURANCE CO	0.69	-1.43%	DUBAI ELECTRICITY &	2.69	11,273.44
SHUAA CAPITAL PSC	0.399	0.76%	DUBAI FINANCIAL MARKET PJSC	1.64	-0.61%	DUBAI FINANCIAL M/	1.64	10,227.80

## Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,662.16							
Change	-9.73	-0.10%						
Previous Close	9,671.89		<b>Financial</b>	16,205.83	16,222.57	-0.10%	-0.10%	0.99%
Open	9,671.89		<b>Telecommunication</b>	5,508.00	5,507.38	0.01%	0.01%	-0.49%
Day's High	9,681.51		<b>Consumer Services</b>	10,756.75	10,733.06	0.22%	0.22%	2.86%
Day's Low	9,643.30		<b>Basic Material</b>	5,487.79	5,382.79	1.95%	1.95%	2.71%
YTD Change	-5.38%		<b>Industrials</b>	3,316.58	3,327.00	-0.31%	-0.31%	1.26%
			<b>Utilities</b>	12,924.12	12,924.12	0.00%	0.00%	-7.65%
Volume Mn	158,282.45		<b>Energy</b>	2,200.62	2,199.84	0.04%	0.04%	5.62%
Value Traded Mn	831.38		<b>Health Care</b>	3,072.03	3,125.48	-1.71%	-1.71%	-0.88%
Traded / Listed Stocks	68	84	<b>Real Estate</b>	8,036.05	8,055.94	-0.25%	-0.25%	4.15%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
GULF CEMENT CO	0.468	6.85%	GULF MEDICAL PROJECTS	1.91	-9.05%	BOROUGE	2.77	69829.25
UNITED ARAB BANK PJSC	1.2	4.35%	APEX INVESTMENT CO PSC	2.2	-2.65%	EMSTEEL BUILDING N	1.61	45861.89
EMSTEEL BUILDING MATERIALS	1.61	3.21%	CHIMERA S&P KSA SHARIA ETF-B	3.38	-1.74%	MULTIPLY GROUP	3.26	16857.48
INSURANCE HOUSE	0.955	2.69%	RESPONSE PLUS HOLDING PJSC	4.84	-1.22%	MANAZEL REAL ESTA	0.46	15861.59
SHARJAH CEMENT & INDUS DEVEL	0.667	2.62%	ALPHA DHABI HOLDING PJSC	20.54	-1.06%	Q HOLDING PJSC	2.44	13071.60

## Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,280.37							
Change	54.92	0.54%						
Previous Close	10225.45		<b>Total Return</b>	22,063.11	21,945.24	0.54%	0.62%	2.04%
Open	10225.45		<b>Rayan Islamic</b>	4,573.15	4,555.70	0.38%	0.60%	1.71%
Day's High	10280.37		<b>All Share</b>	3,467.37	3,450.64	0.48%	0.54%	2.05%
Day's Low	10192.4		<b>Banks &amp; Finance</b>	4,240.14	4,206.61	0.80%	0.73%	1.33%
YTD Change	-0.03751498		<b>Industrials</b>	3,850.32	3,839.71	0.28%	0.16%	4.45%
Volume Mn	129.033		<b>Transportation</b>	4,859.50	4,872.39	-0.26%	0.55%	1.87%
Value Traded Mn	412.6057		<b>Real Estate</b>	1,537.08	1,545.31	-0.53%	0.24%	2.24%
Traded / Listed Stocks	20	51	<b>Insurance</b>	2,391.60	2,380.78	0.45%	1.01%	1.21%
			<b>Telecommunications</b>	1,695.83	1,691.91	0.23%	-0.23%	3.38%
			<b>Consumer Goods</b>	7,893.87	7,852.90	0.52%	0.87%	0.00%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
QATAR ISLAMIC BANK	18.25	2.41%	QATAR GERMAN CO FOR MEDICAL	2.40	-5.85%	QATAR ALUMINUM A	1.29	15612.15
DOHA BANK QPSC	1.62	1.75%	MEKDAM HOLDING GROUP	4.92	-1.68%	QATAR GERMAN CO I	2.40	12615.41
QATAR ELECTRICITY & WATER CO	17.90	1.65%	AL KHALEEJ TAKAFUL GROUP	2.77	-1.67%	WIDAM FOOD CO	2.71	11544.59
QATAR NATIONAL CEMENT CO	3.96	1.23%	QATAR ALUMINUM MANUFACTURING	1.29	-1.45%	MAZAYA REAL ESTAT	0.81	7116.33
QATAR FUEL QSC	16.70	1.15%	WIDAM FOOD CO	2.71	-1.35%	MASRAF AL RAYAN	2.50	6761.93

## Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,980.36							
Change	0.88	0.04%						
Previous Close	1,979.48		<b>MSCI Bahrain</b>	146.44	146.27	0.12%	0.12%	0.89%
Open	1,979.48		<b>MSCI Bahrain Domestic Islamic</b>	52.38	52.14	0.46%	0.46%	1.29%
Day's High	1982.740		<b>MSCI Bahrain Net TR USD</b>	372.10	372.10	0.00%	0.00%	0.79%
Day's Low	1978.160							
YTD Change	4.49%							
Volume Mn	1,854.42							
Value Traded Mn	0.391							
Traded / Listed Stocks	41	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
NATIONAL BANK OF BAHRAIN BSC	0.61	0.83%	GFH FINANCIAL GROUP BSC	0.31	-1.29%	AL SALAM BANK BSC	0.16	1118.35
AL SALAM BANK BSC	0.16	0.62%	GULF HOTEL GROUP B.S.C	0.41	-1.20%	GFH FINANCIAL GRO I	0.31	350.00
BBK BSC	0.51	0.39%	BAHRAIN NATIONAL HOLDING	0.50	-1.00%	BAHRAIN DUTY FREE	0.58	200.00
APM TERMINALS BAHRAIN BSC	1.01	0.20%	ALUMINIUM BAHRAIN BSC	1.10	-0.36%	BBK BSC	0.51	110.00
-	-	-	-	-	-	BAHRAIN NATIONAL I	0.50	70.63

## Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,287.09							
Change	-19.95	-0.27%	<b>Industrials</b>	1,035.48	1,034.24	0.12%	3.23%	-4.02%
Previous Close	7,307.04		<b>Banks</b>	1,771.26	1,778.85	-0.43%	3.84%	-1.26%
Open	7,309.71		<b>Consumer Service</b>	614.05	616.45	-0.39%	-0.17%	27.94%
			<b>Technology</b>	614.01	616.19	-0.35%	-9.15%	-11.81%
Day's High	7,319.89		<b>Real Estate</b>	1,237.47	1,231.90	0.45%	2.48%	2.38%
Day's Low	7,261.31		<b>Financial Services</b>	1,297.38	1,288.61	0.68%	5.74%	3.19%
YTD Change	-0.07%		<b>Telecom</b>	1,146.47	1,155.25	-0.76%	2.60%	-2.96%
			<b>Health Care</b>	455.49	453.98	0.33%	1.35%	-1.38%
Volume Mn	0.27		<b>Insurance</b>	2,103.87	2,101.33	0.12%	-0.29%	35.66%
Value Traded Mn	56.17		<b>Basic Materials</b>	902.51	913.17	-1.17%	-0.54%	4.32%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
MUNSHAAT REAL ESTATE PROJECT	99.70	10.78%	WETHAQ TAKAFUL INSURANCE CO	24.10	-12.04%	AAYAN LEASING & IN	158.00	30330.95
AMAR FINANCE & LEASING CO	63.20	9.91%	KUWAIT & MIDDLE EAST FIN INV	80.00	-8.57%	NATIONAL INDUSTRII	224.00	16919.96
PALMS AGRO PRODUCTION CO	89.90	9.63%	ENERGY HOUSE HOLDING CO KSCP	65.00	-5.80%	KUWAIT PROJECTS HI	139.00	14313.95
SOKOUK HOLDING CO SAK	35.20	5.39%	COMMERCIAL BANK OF KUWAIT	532.00	-5.00%	INTL FINANCIAL ADVI	148.00	11166.20
REAL ESTATE TRADE CENTERS CO	57.30	4.18%	OSOUL INVESTMENT KSCC	94.00	-4.08%	KUWAIT INTERNATIO	169.00	10650.07

Source: FSC

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