

## Financial Services Company GCC Daily Report

18-Jul-23

2023

### Research Department

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# FSC Daily Report

18/07/2023



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	3,021.96	0.1	16.1	19.1	20.1	3.0	2.7	2.06%
MSCI Emerging Markets Index	1,027.76	(0.1)	7.5	13.4	14.8	1.6	1.6	2.88%
MSCI FM FRONTIER MARKETS	503.04	(0.1)	6.5	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	540.28	0.1	(3.3)	12.9	14.7	1.6	1.7	3.57%
Muscat Stock Exchange MSX 30 Index	4,809.85	1.1	(1.0)	12.8	10.9	0.7	0.8	4.52%
Tadawul All Share Index	11,768.71	(0.1)	12.3	18.4	21.7	2.3	2.1	2.88%
Dubai Financial Market General Index	4,021.96	0.1	20.6	9.7	12.2	1.3	1.0	4.39%
FTSE ADX GENERAL INDEX	9,697.61	0.2	(5.0)	32.5	18.8	3.0	1.9	1.74%
Qatar Exchange Index	10,306.04	0.2	(3.5)	12.4	14.8	1.4	1.5	4.80%
Bahrain Bourse All Share Index	1,985.89	0.3	4.8	7.0	11.9	0.7	1.0	7.70%
Boursa Kuwait All Share Price Return Ir	7,319.97	0.5	0.4	18.0	20.3	1.6	1.5	3.61%

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	533.69	(0.2)	5.5	15.2	16.6	1.6	1.7	2.93%
MSCI AC Asia Ex. Japan Index	655.40	(0.1)	5.8	15.4	16.3	1.5	1.6	0.00%
Nikkei 225	32,493.89	0.3	24.5	31.6	23.6	2.0	1.8	1.88%
S&P/ASX 200	7,283.78	(0.2)	3.5	14.9	19.1	2.1	2.1	4.49%
Hang Seng Index	19,015.72	(2.1)	(3.9)	9.7	11.5	1.0	1.1	3.79%
NSE Nifty 50 Index	19,749.25	0.2	9.1	23.7	24.8	3.6	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	153.79	(0.6)	7.9	13.4	16.6	1.7	1.7	3.49%
MSCI Emerging Markets Europe Index	110.96	0.4	18.4	5.2	7.0	1.2	0.9	3.80%
FTSE 100 Index	7,403.63	(0.0)	(0.6)	10.3	14.8	1.6	1.6	4.26%
Deutsche Boerse AG German Stock Inc	16,057.24	(0.1)	15.3	13.1	15.9	1.4	1.6	3.62%
CAC 40 Index	7,288.34	(0.0)	12.6	12.5	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	4,490.55	0.4	17.8	21.7	22.1	4.2	3.8	1.59%
S&P 500 INDEX	4,522.79	0.4	17.8	21.6	21.9	4.4	3.9	1.53%
Dow Jones Industrial Average	34,585.35	0.2	4.3	20.0	19.2	4.5	4.4	2.06%
NASDAQ Composite Index	14,244.95	0.9	36.1	40.4	35.4	5.8	5.3	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	555.83	-1.2	-8.9	-32%	144%
Gold Spot \$/Oz	1,963.41	0.4	7.6	-5%	87%
BRENT CRUDE FUTR Sep23	78.74	0.3	-5.2	-22%	83%
Generic 1st'OQA' Future	79.71	0.3	1.0	-37%	332%
LME COPPER 3MO (\$)	8,491.00	-2.1	1.4	-20%	96%
SILVER SPOT \$/OZ	24.82	-0.1	3.6	-15%	107%

Source: FSC

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### Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,809.85							
Change	52.20	1.10%						
Previous Close	4,757.65		Financial Sector	7,854.68	7,849.20	0.07%	0.31%	-0.62%
Open	4,757.65		Industry Sector	6,158.50	6,120.22	0.63%	0.21%	-4.18%
Day's High	4,809.85		Services Sector	1,693.17	1,676.77	0.98%	-0.12%	4.74%
Day's Low	4,754.01		MSM Shariah Index	475.59	470.06	118.00%	-	-
YTD Change	-0.98%							
Volume Mn	5.08							
MSX30 Value Traded Mn	1.41							
Traded / Listed Stocks	45	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN CHROMITE	4.268	10.00%	OMAN INV&FIN SUB.B	0.080	-11.11%	BANK MUSCAT	0.282	1819.17
ODREDOO	0.390	7.44%	ASAFFA FOODS	0.320	-4.48%	OOREDOO	0.390	411.19
OMAN FLOUR MILLS	0.576	4.73%	OMAN ARAB BANK	0.143	-4.03%	SOHAR INTERNATIO	0.105	398.64
ALBATINAH POWER	0.029	3.57%	ALANWAR INVESTMENT	0.086	-2.27%	NATIONAL BANK OA	0.300	359.13
AL SUWADI POWER	0.029	3.57%	SEMBCORP SALALAH	0.098	-2.00%	OMINVEST	0.379	250.10

### Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,768.71		Tadawul Banks	11,705.36	11,618.76	0.75%	1.72%	3.79%
Change	-11.56	-0.10%	Tadawul Energy	6,058.55	6,062.95	-0.07%	0.40%	0.13%
Previous Close	11,780.27		Tadawul Utilities	8,634.28	8,701.69	-0.77%	2.36%	10.95%
Open	11,780.27		Tadawul Telecom	8,207.38	8,192.11	0.19%	0.41%	2.75%
Day's High	11,826.34		Tadawul Insurance	7,895.62	7,933.09	-0.47%	-0.02%	4.93%
Day's Low	11,726.76		Tadawul Retailing	8,448.73	8,460.41	-0.14%	-0.33%	1.94%
YTD Change	12.31%		Tadawul Food & Beverages	6,163.54	6,215.54	-0.84%	-0.97%	3.81%
Volume Mn	251,788.72		Tadawul Media	23,641.66	24,024.06	-1.59%	1.24%	-3.02%
Value Traded Mn	7,318.95		Tadawul Materials	6,575.91	6,640.03	-0.97%	-1.72%	-0.74%
Traded / Listed Stocks	223	228	Tadawul Capital Goods	7,618.61	7,784.89	-2.14%	-2.75%	0.30%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SASCO	65.4	4.81%	CANADIAN MEDICAL CENTER CO	6.20	-10.14%	AL-BAHA DEVELOPMI	0.17	46092.95
ELM CO	651	3.79%	AME COMPANY FOR MEDICAL SUPP	42.40	-8.13%	TOURISM ENTERPRIS	0.83	32009.24
THE SAUDI NATIONAL BANK	40.3	3.33%	LADUN INVESTMENT CO	2.60	-5.45%	BATIC INVESTMENTS	2.32	25120.83
SAUDI AZM CO. FOR COMMUNICAT	11.36	3.27%	SAUDI CERAMIC CO	30.80	-5.08%	THE SAUDI NATIONAL	40.30	12690.86
CO FOR COOPERATIVE INSURANCE	156.4	2.76%	UNITED INTERNATIONAL TRANSPO	71.80	-5.03%	ANAAM INTERNATIO	1.19	12281.67

## Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,021.96							
Change	3.01	0.07%						
Previous Close	4,018.95		Real Estate & Construction	N/A	N/A	N/A	N/A	N/A
Open	4,018.95		Banking	N/A	N/A	N/A	N/A	N/A
			Investment and Financial	N/A	N/A	N/A	N/A	N/A
Day's High	4,047.16		Insurance	N/A	N/A	N/A	N/A	N/A
Day's Low	4,000.82		Consumer Staples	N/A	N/A	N/A	N/A	N/A
YTD Change	0.21		Services	N/A	N/A	N/A	N/A	N/A
			Industrial	N/A	N/A	N/A	N/A	N/A
Volume Mn	281,800.74		Telecommunication	N/A	N/A	N/A	N/A	N/A
Value Traded Mn	400.23		Transportation	N/A	N/A	N/A	N/A	N/A
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
TABREED	3.25	8.33%	AL FIRDOUS HOLDINGS PJSC	0.68	-9.93%	UNION PROPERTIES F	0.42	87,055.71
DAR AL TAKAFUL	0.781	2.76%	AMLAK FINANCE	0.911	-5.20%	DEYAAR DEVELOPME	0.73	51,324.42
ARAMEX PJSC	3.03	2.02%	UNION PROPERTIES PJSC	0.42	-2.33%	AMLAK FINANCE	0.91	35,501.67
AMANAT HOLDINGS PJSC	1.07	1.90%	GULF NAVIGATION HOLDING PJSC	5.45	-0.91%	GULF NAVIGATION H	5.45	26,590.64
DUBAI FINANCIAL MARKET PJSC	1.67	1.83%	EMIRATES INTEGRATED TELECOMM	5.45	-0.91%	DUBAI ISLAMIC INSUI	0.70	22,352.30

## Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,697.61							
Change	16.46	0.17%						
Previous Close	9,681.15		Financial	16,202.55	16,231.83	-0.18%	-0.12%	0.97%
Open	9,681.15		Telecommunication	5,569.43	5,550.96	0.33%	1.13%	0.62%
			Consumer Services	10,595.31	10,756.75	-1.50%	-1.28%	1.31%
Day's High	9,697.61		Basic Material	5,527.32	5,493.46	0.62%	2.69%	3.45%
Day's Low	9,668.40		Industrials	3,375.34	3,310.30	1.96%	1.45%	3.06%
YTD Change	-5.03%		Utilities	13,082.69	12,844.83	1.85%	1.23%	-6.52%
			Energy	2,230.31	2,207.90	1.01%	1.39%	7.04%
Volume Mn	250,841.41		Health Care	3,073.35	3,076.47	-0.10%	-1.67%	-0.84%
Value Traded Mn	1,068.48		Real Estate	8,100.38	8,053.65	0.58%	0.55%	4.99%
Traded / Listed Stocks	68	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
NATIONAL MARINE DREDGING CO	21.32	7.14%	EMIRATES INSURANCE CO. (PSC)	6.98	-9.94%	Q HOLDING PJSC	2.49	34119.77
APEX INVESTMENT CO PSC	2.29	3.15%	HILY HOLDING PJSC	3.47	-9.87%	EMSTEEL BUILDING I	1.61	16065.01
ABU DHABI NATIONAL TAKAFUL C	6.89	2.84%	FOODCO NATIONAL FOODSTUFF CO	1.55	-9.36%	MULTIPLY GROUP	3.29	14695.24
FERTIGLOBE PLC	3.38	2.74%	SHARJAH CEMENT & INDUS DEVEL	0.632	-5.25%	BOROUGE	2.76	13367.36
ABU DHABI AVIATION CO	7.41	2.07%	RESPONSE PLUS HOLDING PJSC	4.71	-2.69%	ESHRAQ INVESTMEN'	0.58	12649.56

## Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,306.04							
Change	25.67	0.25%						
Previous Close	10280.37		<b>Total Return</b>	22,118.20	22,063.11	0.25%	0.87%	2.30%
Open	10280.37		<b>Rayan Islamic</b>	4,586.31	4,573.15	0.29%	0.89%	2.00%
Day's High	10313.89		<b>All Share</b>	3,472.84	3,467.37	0.16%	0.70%	2.21%
Day's Low	10255.55		<b>Banks &amp; Finance</b>	4,241.28	4,240.14	0.03%	0.76%	1.36%
YTD Change	-0.03511168		<b>Industrials</b>	3,863.14	3,850.32	0.33%	0.49%	4.80%
Volume Mn	91.662		<b>Transportation</b>	4,858.96	4,859.50	-0.01%	0.54%	1.86%
Value Traded Mn	290.3766		<b>Real Estate</b>	1,535.58	1,537.08	-0.10%	0.14%	2.14%
Traded / Listed Stocks	20	51	<b>Insurance</b>	2,375.05	2,391.60	-0.69%	0.31%	0.51%
			<b>Telecommunications</b>	1,726.28	1,695.83	1.80%	1.56%	5.24%
			<b>Consumer Goods</b>	7,906.02	7,893.87	0.15%	1.02%	0.15%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
MEKDAM HOLDING GROUP	5.05	2.48%	WIDAM FOOD CO	2.58	-4.51%	MASRAF AL RAYAN	2.47	11185.51
OORED00 QPSC	11.56	2.03%	QATAR GENERAL INSURANCE & RE	1.30	-2.26%	QATAR ALUMINIUM N	1.29	7680.48
ZAD HOLDING CO	13.90	1.98%	INMA HOLDING COMPANY	4.80	-2.06%	WIDAM FOOD CO	2.58	6544.41
QATAR GERMAN CO FOR MEDICAL	2.44	1.58%	QATAR ISLAMIC INSURANCE GROU	8.59	-1.68%	QATAR GERMAN CO I	2.44	5679.86
MANNAI CORPORATION QSC	5.38	1.49%	DLALA HOLDING	1.46	-1.22%	MAZAYA REAL ESTAT	0.80	5326.97

## Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,985.89							
Change	5.53	0.28%						
Previous Close	1,980.36		<b>MSCI Bahrain</b>	146.00	146.44	-0.30%	-0.18%	0.59%
Open	1,980.36		<b>MSCI Bahrain Domestic Islamic</b>	52.19	52.38	-0.36%	0.09%	0.92%
Day's High	1987.230		<b>MSCI Bahrain Net TR USD</b>	371.52	372.10	-0.16%	-0.16%	0.63%
Day's Low	1980.360							
YTD Change	4.78%							
Volume Mn	2,136.88							
Value Traded Mn	0.591							
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 HOTELS CO	0.18	2.94%	BAHRAIN ISLAMIC BANK	0.07	-1.33%	AL SALAM BANK BSC	0.17	1234.80
AL SALAM BANK BSC	0.17	1.85%	-	-	-	GFH FINANCIAL GROU	0.31	130.59
BBK BSC	0.52	0.98%	-	-	-	BAHRAIN DUTY FREE	0.58	100.00
ALUMINIUM BAHRAIN BSC	1.10	0.37%	-	-	-	ITHMAAR HOLDING E	0.08	76.00
-	-	-	-	-	-	ALUMINIUM BAHRAII	1.10	66.25

## Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,319.97							
Change	32.88	0.45%	<b>Industrials</b>	1,035.94	1,035.48	0.04%	3.28%	-3.98%
Previous Close	7,287.09		<b>Banks</b>	1,779.94	1,771.26	0.49%	4.35%	-0.78%
Open	7,290.79		<b>Consumer Service</b>	615.02	614.05	0.16%	-0.01%	28.14%
			<b>Technology</b>	614.01	614.01	0.00%	-9.15%	-11.81%
Day's High	7,320.81		<b>Real Estate</b>	1,238.22	1,237.47	0.06%	2.54%	2.44%
Day's Low	7,283.72		<b>Financial Services</b>	1,310.44	1,297.38	1.01%	6.80%	4.23%
YTD Change	0.38%		<b>Telecom</b>	1,149.46	1,146.47	0.26%	2.87%	-2.71%
			<b>Health Care</b>	461.54	455.49	1.33%	2.69%	-0.07%
Volume Mn	0.23		<b>Insurance</b>	2,105.80	2,103.87	0.09%	-0.20%	35.79%
Value Traded Mn	47.99		<b>Basic Materials</b>	903.57	902.51	0.12%	-0.42%	4.45%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
EKTITAB HOLDING CO SAK	23.30	12.56%	AMAR FINANCE & LEASING CO	54.50	-13.77%	NATIONAL INDUSTRII	228.00	14222.91
WETHAQ TAKAFUL INSURANCE CO	26.40	9.54%	FIRST TAKAFUL INSURANCE CO	47.60	-8.99%	KUWAIT FINANCE HC	783.00	13009.07
AL-DEERA HOLDING CO	172.00	7.50%	SANAM REAL ESTATE CO KSCC	73.00	-6.29%	AL-MAZAYA HOLDING CO	51.00	12677.83
INDEPENDENT PETROLEUM GROUP	479.00	7.40%	TAAMEER REAL ESTATE INVEST C	17.50	-5.91%	AAYAN LEASING & IN	162.00	12439.16
AQAR REAL ESTATE INVESTMENTS	55.00	5.77%	REAL ESTATE TRADE CENTERS CO	54.00	-5.76%	SOKOUK HOLDING CO	33.50	10451.96

Source: FSC