

Financial Services Company
GCC Daily Report

30-Sep-23

2023

Research Department

PO Box 2777, PC 112, Sultanate of Oman
Tel: +968 24825620 Fax: +968 24817205
Website: www.fscoman.net

FSC Daily Report

03/09/2023



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	2,989.51	0.1	14.9	19.1	20.1	3.0	2.7	2.03%
MSCI Emerging Markets Index	985.68	0.5	3.1	14.1	14.8	1.5	1.6	2.87%
MSCI FM FRONTIER MARKETS	508.88	(0.2)	7.7	9.9	13.1	1.6	1.8	3.77%

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 I	526.27	0.0	(5.8)	12.2	14.7	1.6	1.7	3.76%
Muscat Stock Exchange MSX 30 Index	4,774.54	(0.5)	(1.7)	13.2	11.0	1.0	0.8	4.55%
Tadawul All Share Index	11,455.78	(0.3)	9.3	19.2	21.8	2.2	2.1	3.22%
Dubai Financial Market General Index	4,090.04	0.2	22.6	9.3	12.3	1.4	1.0	4.47%
FTSE ADX GENERAL INDEX	9,786.63	(0.2)	(4.2)	32.3	19.3	3.0	2.0	1.72%
Qatar Exchange Index	10,185.99	(0.1)	(4.6)	12.8	13.0	1.4	1.5	4.85%
Bahrain Bourse All Share Index	1,956.73	0.2	3.2	7.3	11.8	0.7	1.0	8.56%
Boursa Kuwait All Share Price Return I	6,990.09	(0.2)	(4.1)	16.4	20.3	1.5	1.5	3.93%

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 I	508.72	0.3	0.6	16.0	16.6	1.5	1.7	2.97%
MSCI AC Asia Ex. Japan Index	625.45	0.5	1.0	16.0	16.3	1.4	1.6	0.00%
Nikkei 225	32,710.62	0.3	25.4	26.0	23.9	1.9	1.8	1.89%
S&P/ASX 200	7,278.30	(0.4)	3.4	16.5	19.0	2.1	2.1	4.47%
Hang Seng Index	18,382.06	(0.5)	(7.1)	10.3	11.5	1.0	1.1	3.82%
NSE Nifty 50 Index	19,435.30	0.9	7.3	22.4	24.7	2.9	3.0	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	153.89	(0.0)	8.0	12.8	16.6	1.9	1.7	3.44%
MSCI Emerging Markets Europe Index	111.38	0.3	18.9	6.2	7.0	1.3	0.9	3.78%
FTSE 100 Index	7,464.54	0.3	0.2	10.8	14.6	1.7	1.6	4.06%
Deutsche Boerse AG German Stock In	15,840.34	(0.7)	13.8	12.5	15.8	1.5	1.6	3.67%
CAC 40 Index	7,296.77	(0.3)	12.7	12.6	17.0	1.8	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	4,479.74	0.2	17.5	22.3	22.2	4.1	3.8	1.58%
S&P 500 INDEX	4,515.77	0.2	17.6	22.1	22.0	4.3	3.9	1.54%
Dow Jones Industrial Average	34,837.71	0.3	5.1	20.9	19.3	4.5	4.4	2.07%
NASDAQ Composite Index	14,031.81	(0.0)	34.1	39.4	36.4	5.7	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	599.0	1.3	-1.8	-27%	162%
Gold Spot \$/Oz	1,940.1	0.0	6.4	-6%	85%
BRENT CRUDE FUTR Nov23	88.6	2.0	7.9	-11%	104%
Generic 1st'OQA' Future	89.7	1.9	13.7	-29%	386%
LME COPPER 3MO (\$)	8,500.5	0.9	1.5	-20%	96%
SILVER SPOT \$/OZ	24.2	-1.0	1.0	-17%	102%

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,774.54							
Change	-24.42	-0.51%						
Previous Close	4,798.97		Financial Sector	7,808.32	7,831.43	-0.30%	-0.30%	-1.20%
Open	4,798.97		Industry Sector	5,925.50	6,010.53	-1.41%	-1.41%	-7.81%
Day's High	4,802.99		Services Sector	1,650.98	1,662.96	-0.72%	-0.72%	2.13%
Day's Low	4,772.88		MSX Shariah Index	473.03	480.48	-1.55%	-1.55%	-6.37%
YTD Change	-1.71%							
Volume Mn	9.94							
MSX30 Value Traded Mn	2.07							
Traded / Listed Stocks	43.00	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
TAAGEER FINANCE	0.093	3.33%	ASAFFA FOODS	0.315	-10.00%	BANK MUSCAT	0.284	1916.2
GLOBAL FINANCIAL INVESTMENT HC	0.061	1.67%	SMN POWER HOLDING	0.072	-4.00%	PHOENIX POWER	0.065	1601.0
MUSCAT CITY DESALINATION	0.093	1.09%	VOLTAMP ENERGY	0.123	-3.91%	OMINVEST	0.400	1166.3
BANK MUSCAT PER.B1	0.800	0.88%	AMAN REAL ESTATE	0.100	-3.85%	SMN POWER HOLDING	0.072	947.5
OMINVEST	0.400	0.50%	GULF MUSHROOM PRODUCTS	0.220	-3.51%	BANK NIZWA	0.099	899.1

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,455.78							
Change	-35.42	-0.31%	Tadawul Banks	11,064.59	11,090.93	-0.24%	-0.24%	-0.24%
Previous Close	11,491.20		Tadawul Energy	6,461.09	6,541.38	-1.23%	-1.23%	-1.23%
Open	11,491.20		Tadawul Utilities	8,232.38	8,361.75	-1.55%	-1.55%	-1.55%
Day's High	11,511.16		Tadawul Telecom	7,428.22	7,412.94	0.21%	0.21%	0.21%
Day's Low	11,432.30		Tadawul Insurance	8,092.73	7,971.12	1.53%	1.53%	1.53%
YTD Change	9.33%		Tadawul Retailing	7,882.27	7,917.26	-0.44%	-0.44%	-0.44%
Volume Mn	299,054.16		Tadawul Food & Beverages	5,940.91	5,885.13	0.95%	0.95%	0.95%
Value Traded Mn	8,678.78		Tadawul Media	24,287.76	24,202.68	0.35%	0.35%	0.35%
Traded / Listed Stocks	223	228	Tadawul Materials	6,445.24	6,406.36	0.61%	0.61%	0.61%
			Tadawul Capital Goods	8,031.10	7,960.20	0.89%	0.89%	0.89%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
AL SAGR CO-OPERATIVE INSURAN	18.70	10.00%	NATIONAL ENVIORNMENTAL RECYC	8.38	-6.89%	AL-BAHA DEVELOPMENT & INVEST	0.16	14459.4
TABUK AGRICULTURAL DEVELOPME	17.20	8.86%	SAUDI PARTS CENTER CO	71.00	-6.58%	SAUDI ARABIAN OIL CO	34.45	12030.8
SAUDI ARABIAN AMIANTIT CO	46.50	4.85%	SEERA GROUP HOLDING	28.00	-3.45%	NATIONAL GAS & INDUSTRIALIZA	64.30	8532.0
BUPA ARABIA FOR COOPERATIVE	210.00	4.17%	JAHEZ INTERNATIONAL CO	564.00	-3.36%	TOURISM ENTERPRISE CO/ SHAMS	0.76	7353.1
SALAMA COOPERATIVE INSURANCE	24.90	4.01%	ARABIAN PIPES CO	77.10	-3.14%	ANAAM INTERNATIONAL HOLDING	1.09	4321.9

Note that the KSA data is updated till 3:00 PM Muscat Time

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,090.04							
Change	7.17	0.18%						
Previous Close	4,082.87		Real Estate & Construction	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
Open	4,082.87		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	4,094.10		Insurance	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
Day's Low	4,078.46		Consumer Staples	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
YTD Change	0.23		Services	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
			Industrial	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
Volume Mn	75,899.89		Telecommunication	(N/A)	(N/A)	(N/A)	(N/A)	(N/A)
Value Traded Mn	179.62		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
-	-	-	-	-	-	UNION PROPERTIES PJSC	0.41	30,819.02
-	-	-	-	-	-	AJMAN BANK PJSC	2.41	6,848.33
-	-	-	-	-	-	EMAAR PROPERTIES PJSC	7.08	4,704.48
-	-	-	-	-	-	SHUAA CAPITAL PSC	0.39	3,700.24
-	-	-	-	-	-	AMANAT HOLDINGS PJSC	1.05	2,946.64

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,786.63							
Change	-23.58	-0.24%						
Previous Close	9,810.21		Financial	16,669.08	16,713.77	-0.27%		-0.27%
Open	9,810.21		Telecommunication	4,865.09	4,922.37	-1.16%		-1.16%
			Consumer Services	10,345.83	10,510.42	-1.57%		-1.57%
Day's High	9,815.73		Basic Material	5,535.36	5,490.96	0.81%		0.81%
Day's Low	9,768.13		Industrials	3,281.65	3,302.17	-0.62%		-0.62%
YTD Change	-4.16%		Utilities	13,677.36	13,637.72	0.29%		0.29%
			Energy	2,220.91	2,215.91	0.23%		0.23%
Volume Mn	119,697.78		Health Care	3,588.39	3,600.32	-0.33%		-0.33%
Value Traded Mn	774.86		Real Estate	8,167.34	8,087.09	0.99%		0.99%
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
-	-	-	-	-	-	MULTIPLY GROUP	3.95	30,305.86
-	-	-	-	-	-	Q HOLDING PJSC	3.76	21,137.00
-	-	-	-	-	-	RAK PROPERTIES	1.16	10,826.61
-	-	-	-	-	-	DANA GAS	0.94	9,023.79
-	-	-	-	-	-	ABU DHABI NATIONAL ENERGY CO	3.45	8,033.43

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,185.99							
Change	-8.75	-0.09%	Total Return	21,860.56	21,879.35	-0.09%	-0.09%	-0.09%
Previous Close	10194.74		Rayan Islamic	4,519.34	4,512.80	0.14%	0.14%	0.14%
Open	10194.74		All Share	3,432.96	3,436.68	-0.11%	-0.11%	-0.11%
Day's High	10300.42		Banks & Finance	4,210.98	4,226.03	-0.36%	-0.36%	-0.36%
Day's Low	10185.81		Industrials	3,960.13	3,955.32	0.12%	0.12%	0.12%
YTD Change	-0.0463512		Transportation	4,381.06	4,387.30	-0.14%	-0.14%	-0.14%
Volume Mn	168.674		Real Estate	1,512.97	1,504.54	0.56%	0.56%	0.56%
Value Traded Mn	418.303		Insurance	2,425.46	2,427.53	-0.09%	-0.09%	-0.09%
Traded / Listed Stocks	20	51	Telecommunications	1,631.86	1,625.03	0.42%	0.42%	0.42%
			Consumer Goods	7,646.81	7,629.20	0.23%	0.23%	0.23%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
QATAR EXCHANGE INDEX ETF	9.90	9.31%	QATAR GENERAL INSURANCE & RE	1.20	-3.15%	EZDAN HOLDING GROUP	1.05	26653.74
QATAR INDUSTRIAL MANUFACTUR	3.10	3.82%	AL RAYAN QATAR ETF	2.21	-2.30%	GULF INTERNATIONAL SERVICES	2.62	23391.49
AL KHALEEJ TAKAFUL GROUP	2.88	2.42%	QATAR GERMAN CO FOR MEDICAL	2.31	-2.12%	QATAR ALUMINUM MANUFACTUR	1.33	18098.68
QATAR NATIONAL CEMENT CO	3.53	0.86%	ESTITHMAR HOLDING QPSC	2.19	-1.88%	QATAR GERMAN CO FOR MEDICAL	2.31	11094.85
AAMAL CO	0.85	0.83%	QATAR ISLAMIC INSURANCE GROU	8.82	-1.78%	VODAFONE QATAR	1.85	9669.54

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,956.73							
Change	4.57	0.23%						
Previous Close	1,952.16		MSCI Bahrain	143.96	143.96	0.00%	0.00%	0.00%
Open	1,952.16		MSCI Bahrain Domestic Islamic	53.33	53.33	0.00%	0.00%	0.00%
Day's High	1957.210		MSCI Bahrain Net TR USD	373.46	373.46	0.00%	0.00%	0.00%
Day's Low	1952.070							
YTD Change	3.24%							
Volume Mn	1,776.80							
Value Traded Mn	0.729							
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
ESTERAD INVESTMENT CO B.S.C.	0.13	9.57%	APM TERMINALS BAHRAIN BSC	0.99	-1.50%	ARAB BANKING CORP BSC-\$US	0.24	1533.90
ARAB BANKING CORP BSC-\$US	0.24	4.35%	ZAIN BAHRAIN BSCC	0.13	-0.78%	AL SALAM BANK BSC	0.19	1264.08
TRAFICO GROUP BSC	0.28	3.70%	BBK BSC	0.51	-0.20%	NATIONAL BANK OF BAHRAIN BSC	0.61	227.57
NATIONAL BANK OF BAHRAIN BSC	0.61	0.17%	-	-	-	ZAIN BAHRAIN BSCC	0.13	100.00
-	-	-	-	-	-	ESTERAD INVESTMENT CO B.S.C.	0.13	38.12

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	6,990.09							
Change	-15.75	-0.22%	Industrials	940.13	940.66	-0.06%	-0.06%	-12.86%
Previous Close	7,005.84		Banks	1,693.25	1,698.27	-0.30%	-0.30%	-5.61%
Open	7,022.98		Consumer Service	610.37	608.65	0.28%	0.28%	27.17%
			Technology	582.00	582.00	0.00%	0.00%	-16.41%
Day's High	7,032.51		Real Estate	1,214.02	1,214.96	-0.08%	-0.08%	0.44%
Day's Low	6,984.38		Financial Services	1,269.80	1,269.87	-0.01%	-0.01%	1.00%
YTD Change	-4.14%		Telecom	1,106.96	1,104.56	0.22%	0.22%	-6.31%
			Health Care	482.72	482.72	0.00%	0.00%	4.52%
Volume Mn	0.15		Insurance	2,253.07	2,251.99	0.05%	0.05%	45.28%
Value Traded Mn	29.61		Basic Materials	866.99	880.48	-1.53%	-1.53%	0.22%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	KWD	%		KWD	%	Companies	KWD	000
GULF FRANCHISING HOLDING CO	56.00	9.80%	AL MASAKEN INTL REAL ESTATE	28.50	-13.64%	AAYAN LEASING & INVESTMENT	168.00	16736.42
AL-MASSALEH REAL ESTATE CO	30.50	5.17%	COMMERCIAL BANK OF KUWAIT	622.00	-4.89%	AL MASAKEN INTL REAL ESTATE	28.50	13824.43
KUWAIT BUSINESS TOWN REAL ES	62.90	4.83%	ENERGY HOUSE HOLDING CO KSCP	55.10	-4.84%	ARZAN FINANCIAL GROUP FOR FI	160.00	11619.29
NATIONAL INDUSTRIES CO KSC	174.00	4.82%	REAL ESTATE TRADE CENTERS CO	47.00	-4.08%	KUWAIT REAL ESTATE CO KSC	163.00	9629.68
NATIONAL CLEANING COMPANY	35.90	4.66%	JAZEERA AIRWAYS CO KSC	1605.00	-3.89%	IFA HOTELS & RESORTS CO. K.S	182.00	6581.16

Disclaimer

This report prepared by Financial Services Co. SAOG (FSC), and provided for information purposes only. Under no circumstances is to be used or considered as an offer to sell or solicitation of any offer to buy. While all reasonable care has been taken to ensure that the information contained therein is not untrue or misleading at the time of publication, we make no representation as to its accuracy or completeness and it should not be relied upon as such, and the FSC accepts no responsibility whatsoever for any direct or indirect consequential loss arising from any use of this report or its contents. All opinions and estimates included in this document constitute FSC judgment as of the date of production of this report, and are subject to change without notice. This report may not be reproduced, distributed or published by any recipient for any purpose.