

Financial Services Company
GCC Daily Report



2024

Research Department

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

FSC Daily Report

30/06/2024



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	3,511.78	(0.3)	10.8	22.1	20.7	3.4	2.9	1.80%
MSCI Emerging Markets Index	1,086.25	0.4	6.1	15.6	15.0	1.7	1.7	2.59%
MSCI FM FRONTIER MARKETS	523.38	(0.3)	3.2	11.4	12.8	1.6	1.7	4.37%

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	507.97	0.5	(4.3)	10.0	14.3	1.5	1.7	4.72%
Muscat Stock Exchange MSX 30 Index	4,687.26	(0.0)	3.8	12.5	11.9	0.9	0.8	5.25%
Tadawul All Share Index	11,679.50	(0.4)	(2.4)	20.3	22.2	2.4	2.3	3.57%
Dubai Financial Market General Index	4,030.00	0.5	(0.7)	7.9	12.0	1.2	1.1	5.90%
FTSE ADX GENERAL INDEX	9,060.73	0.6	(5.4)	18.2	21.1	2.7	2.2	2.17%
Qatar Exchange Index	9,967.56	0.1	(8.0)	11.2	14.5	1.3	1.5	4.78%
Bahrain Bourse All Share Index	2,025.49	(0.3)	2.7	8.5	11.4	0.8	0.9	8.30%
Boursa Kuwait All Share Price Return I	6,936.98	(0.4)	1.8	17.9	20.2	1.6	1.5	3.35%

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	566.81	0.3	7.2	17.3	16.9	1.8	1.7	2.54%
MSCI AC Asia Ex. Japan Index	696.58	0.3	8.6	17.0	16.7	1.7	1.7	0.00%
Nikkei 225	39,583.08	0.6	18.3	25.4	25.1	2.1	1.9	1.65%
S&P/ASX 200	7,767.47	0.1	2.3	19.6	19.1	2.3	2.2	3.77%
Hang Seng Index	17,718.61	0.0	3.9	9.9	11.1	1.0	1.1	4.43%
NSE Nifty 50 Index	24,010.60	(0.1)	10.5	24.1	24.7	3.9	3.4	1.20%

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	171.72	(0.2)	6.9	15.5	16.5	2.1	1.9	3.28%
MSCI Emerging Markets Europe Index	132.22	0.4	12.7	7.6	7.0	1.2	1.0	3.76%
FTSE 100 Index	8,164.12	(0.2)	5.6	14.6	14.3	1.9	1.7	3.97%
Deutsche Boerse AG German Stock In	18,235.45	0.1	8.9	16.1	15.7	1.6	1.6	3.03%
CAC 40	7,479.40	(0.7)	(0.8)	13.0	16.6	1.9	1.8	3.33%

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	5,384.31	(0.4)	13.5	25.6	23.0	4.7	4.0	1.38%
S&P 500 INDEX	5,460.48	(0.4)	14.5	25.6	22.8	4.9	4.1	1.33%
Dow Jones Industrial Average	39,118.86	(0.1)	3.8	22.4	20.3	5.0	4.6	1.87%
NASDAQ Composite Index	17,732.60	(0.7)	18.1	43.6	37.3	6.9	5.7	0.70%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	578.4	-0.4	8.0	-30%	153%
Gold Spot \$/Oz	2,326.8	0.0	12.8	-4%	121%
BRENT CRUDE FUTR Sep24	85.0	-0.3	12.0	-5%	87%
Generic 1st'OQA' Future	85.0	-1.3	11.4	-32%	361%
LME COPPER 3MO (\$)	9,599.0	0.9	12.2	-12%	122%
SILVER SPOT \$/OZ	29.1	0.6	22.5	-9%	143%

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,687.26							
Change	-0.60	-0.01%						
Previous Close	4,687.86		Financial Sector	7,684.90	7,699.87	-0.19%	-4.12%	3.95%
Open	4,687.86		Industry Sector	6,066.29	5,967.53	1.66%	2.56%	10.80%
Day's High	4,722.67		Services Sector	1,820.39	1,797.40	1.28%	1.03%	16.28%
Day's Low	4,687.26		MSM Shariah Index	447.27		0.08%		
YTD Change	3.84%							
Volume Mn	5.99							
MSX30 Value Traded Mn	1.05							
Traded / Listed Stocks	42.00	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
DHOFAR BEVERAGES	0.229	9.57%	ALOMANIYA.F.B23	0.070	-12.50%	GALFAR ENGINEERING & CONTRA	0.173	3415.0
BARKA WATER AND POWER	0.250	6.38%	SHARQIYAH DESALINATION	0.130	-6.48%	SOHAR INTERNATIONAL BANK	0.134	3334.2
DHOFAR GENERATING	0.828	3.50%	SHELL OMAN MARKETING	0.800	-3.61%	OQ GAS NETWORKS	0.142	2125.7
BARKA DESALINATION	0.173	2.98%	NATIONAL GAS	0.081	-2.41%	BANK MUSCAT	0.263	1432.1
OMAN ARAB BANK	0.380	2.70%	GULF MUSHROOM PRODUCTS	0.221	-1.34%	SEMBCORP SALALAH	0.103	834.7

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,679.50							
Change	-50.12	-0.43%	Tadawul Banks	11,498.34	11,641.13	-1.23%	-1.23%	4.48%
Previous Close	11,729.62		Tadawul Energy	5,276.91	5,240.00	0.70%	0.70%	-3.57%
Open	11,729.62		Tadawul Utilities	12,479.69	12,537.39	-0.46%	-0.46%	-9.38%
Day's High	11,758.67		Tadawul Telecom	7,572.25	7,584.68	-0.16%	-0.16%	6.45%
Day's Low	11,679.50		Tadawul Insurance	10,939.15	11,200.48	-2.33%	-2.33%	8.02%
YTD Change	-2.41%		Tadawul Retailing	7,400.79	7,454.76	-0.72%	-0.72%	-0.52%
Volume Mn	239,190.90		Tadawul Food & Beverages	6,027.91	6,089.63	-1.01%	-1.01%	5.83%
Value Traded Mn	5,294.37		Tadawul Media	27,633.85	27,434.73	0.73%	0.73%	4.09%
Traded / Listed Stocks	233	228	Tadawul Materials	5,747.25	5,723.28	0.42%	0.42%	-1.31%
			Tadawul Capital Goods	12,565.39	12,509.10	0.45%	0.45%	6.99%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
ENMA AL-RAWABI COMPANY	20.90	9.31%	NATIONAL BUILDING AND MARKET	210.00	-6.67%	TOURISM ENTERPRISE CO/ SHAMS	0.78	19742.0
ASTRA INDUSTRIAL GROUP	166.20	6.40%	ARABIAN FOOD & DAIRY FACTORI	80.00	-5.88%	ANAAM INTERNATIONAL HOLDING	1.25	13325.1
SAUDI AZM CO. FOR COMMUNICAT	18.40	5.14%	SASCO	52.60	-5.73%	SAUDI ARABIAN OIL CO	27.90	11367.9
SAUDI VITRIFIED CLAY PIPE CO	44.90	4.30%	RAYDAN FOOD CO	29.15	-4.74%	AL-BAHA DEVELOPMENT & INVEST	0.12	11137.4
AL JOUF AGRICULTURE DEVELOPM	69.20	4.06%	BUPA ARABIA FOR COOPERATIVE	246.80	-3.97%	MAHARAH HUMAN RESOURCES CC	6.03	6555.0

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,030.00							
Change	21.04	0.52%						
Previous Close	4,008.96		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	4,009.78		Banking	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	4,037.54		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	4,008.60		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	-0.01		Services	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
			Industrial	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	148,253.51		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	654.52		Transportation	#N/A N/A	#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	0.768	4.35%	AL SALAM BANK SUDAN	0.597	-9.95%	DRAKE & SCULL INTERNATIONAL	0.38	59681.26
AMANAT HOLDINGS PJSC	1.1	3.77%	TABREED	3	-1.64%	EMAAR PROPERTIES PJSC	8.20	26281.25
COMMERCIAL BANK OF DUBAI	6.2	2.65%	DUBAI ISLAMIC INSURANCE CO	0.392	-1.01%	DUBAI ELECTRICITY & WATER AU	2.20	15484.92
DEYAAR DEVELOPMENT PJSC	0.715	1.56%	DUBAI FINANCIAL MARKET PJSC	1.27	-0.78%	ARAMEX PJSC	2.48	13790.73
DUBAI ISLAMIC BANK	5.74	1.41%	DUBAI ELECTRICITY & WATER AU	2.2	-0.45%	DUBAI ISLAMIC BANK	5.74	10849.20

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,060.73							
Change	56.64	0.63%						
Previous Close	9,004.09		Financial	16,214.33	16,147.59	0.41%	0.00%	1.60%
Open	9,004.09		Telecommunication	3,987.86	3,951.53	0.92%	0.00%	-0.36%
			Consumer Services	12,650.80	11,975.18	5.64%	0.00%	6.76%
Day's High	9,071.21		Basic Material	4,437.80	4,446.25	-0.19%	0.00%	-1.33%
Day's Low	8,996.37		Industrials	2,475.20	2,497.33	-0.89%	0.00%	3.90%
YTD Change	-5.40%		Utilities	12,514.98	11,640.92	7.51%	0.00%	21.15%
			Energy	1,913.56	1,904.37	0.48%	0.00%	1.24%
Volume Mn	387,700.15		Health Care	2,955.25	2,947.74	0.25%	0.00%	8.14%
Value Traded Mn	1,552.50		Real Estate	9,285.52	9,072.02	2.35%	0.00%	11.06%
Traded / Listed Stocks	72	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
ABU DHABI NATIONAL INSURANCE	6.35	12.39%	RAS AL KHAIMA POULTRY	1.47	-9.82%	ABU DHABI NATIONAL ENERGY CO	3.15	67250.83
UNION INSURANCE CO	0.65	8.33%	ESG EMIRATES STALLIONS GROU	10	-4.76%	MULTIPLY GROUP	2.05	39178.14
ABU DHABI NATIONAL ENERGY CO	3.15	7.51%	COMMERCIAL BANK INTERNATIONA	0.6	-4.76%	ESHRAQ INVESTMENTS PJSC	0.32	32469.26
GULF MEDICAL PROJECTS	1.92	6.67%	PALMS SPORTS P.J.S.C	10.42	-4.40%	ABU DHABI NATIONAL HOTELS	0.60	22509.03
AGTHIA GROUP PJSC	6	6.38%	GHITHA HOLDING PJSC	31.2	-3.64%	ALDAR PROPERTIES PJSC	6.26	22260.52

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,967.56							
Change	5.99	0.06%	Total Return	22,419.05	22,405.57	0.06%	0.06%	6.96%
Previous Close	9961.57		Rayan Islamic	4,632.13	4,634.10	-0.04%	-0.04%	4.18%
Open	9961.57		All Share	3,484.03	3,481.94	0.06%	0.06%	6.40%
Day's High	9998.36		Banks & Finance	4,123.49	4,116.77	0.16%	0.16%	6.86%
Day's Low	9957.15		Industrials	4,140.91	4,132.58	0.20%	0.20%	6.02%
YTD Change	-0.0796879		Transportation	5,546.87	5,572.35	-0.46%	-0.46%	11.81%
Volume Mn	116.749		Real Estate	1,525.63	1,532.99	-0.48%	-0.48%	-3.21%
Value Traded Mn	303.2412		Insurance	2,267.03	2,274.44	-0.33%	-0.33%	-0.80%
Traded / Listed Stocks	20	51	Telecommunications	1,605.50	1,606.55	-0.07%	-0.07%	6.40%
			Consumer Goods	7,464.56	7,455.47	0.12%	0.12%	7.00%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
WIDAM FOOD CO	2.74	3.79%	MAZAYA REAL ESTATE DEVELOPME	0.62	-1.73%	MASRAF AL RAYAN	2.33	9517.19
INMA HOLDING COMPANY	4.55	3.30%	QLM LIFE & MEDICAL INSURANCE	2.01	-1.57%	MESAIEED PETROCHEMICAL HOLDI	1.65	9296.17
DOHA BANK QPSC	1.46	1.96%	QATAR GERMAN CO FOR MEDICAL	1.91	-1.29%	QATAR GERMAN CO FOR MEDICAL	1.91	8905.98
DLALA HOLDING	1.25	1.54%	ALIJARAH HOLDING COMPANY QPS	0.70	-1.26%	MAZAYA REAL ESTATE DEVELOPME	0.62	8747.16
AL FALEH EDUCATION HOLDING	0.69	1.32%	QATARI INVESTORS GROUP	1.55	-1.02%	QATAR ALUMINIUM MANUFACTUR	1.33	6611.17

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	2,025.49							
Change	-5.18	-0.26%						
Previous Close	2,030.68		MSCI Bahrain	160.61	160.61	0.00%	0.00%	0.71%
Open	2,030.68		MSCI Bahrain Domestic Islamic	61.96	61.96	0.00%	0.00%	1.39%
Day's High	2030.680		MSCI Bahrain Net TR USD	433.22	433.22	0.00%	0.00%	0.71%
Day's Low	2024.470							
YTD Change	2.74%							
Volume Mn	932.49							
Value Traded Mn	0.340							
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
ZAIN BAHRAIN BSCC	0.12	1.67%	BAHRAIN DUTY FREE COMPLEX	0.49	-5.77%	AL SALAM BANK BSC	0.24	394.19
-	-	-	ALUMINIUM BAHRAIN BSC	1.18	-0.84%	ZAIN BAHRAIN BSCC	0.12	70.00
-	-	-	AL SALAM BANK BSC	0.24	-0.42%	ALUMINIUM BAHRAIN BSC	1.18	28.79
-	-	-	-	-	-	BBK BSC	0.51	16.37
-	-	-	-	-	-	BAHRAIN DUTY FREE COMPLEX	0.49	5.00

Boursa Kuwait

	6,936.98		Sub Sectors	Current	Previous	DTD	MTD	YTD
Close								
Change	-30.12	-0.43%	Industrials	772.62	763.03	1.26%	4.19%	-14.90%
Previous Close	6,967.10		Banks	1,712.05	1,724.14	-0.70%	-1.70%	3.92%
Open	6,973.62		Consumer Service	824.38	819.96	0.54%	-5.98%	25.18%
			Technology	1,585.95	1,622.32	-2.24%	-6.84%	174.22%
Day's High	6,984.56		Real Estate	1,295.58	1,295.62	0.00%	-2.32%	6.82%
Day's Low	6,936.88		Financial Services	1,311.27	1,309.57	0.13%	-3.61%	8.17%
YTD Change	1.76%		Telecom	983.66	981.80	0.19%	-1.34%	-10.99%
			Health Care	441.63	441.63	0.00%	-0.96%	-8.40%
Volume Mn	0.14		Insurance	2,519.70	2,574.49	-2.13%	0.37%	9.90%
Value Traded Mn	37.46		Basic Materials	755.50	760.38	-0.64%	-10.08%	1.28%
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
AL ARABI GROUP HOLDING CO	325.00	7.26%	KUWAIT NATIONAL CINEMA CO	1117.00	-13.28%	KUWAIT REAL ESTATE CO KSC	228.00	18166.77
KUWAIT & MIDDLE EAST FIN INV	110.00	5.77%	KUWAIT BUSINESS TOWN REAL ES	52.70	-8.03%	GULF BANK	279.00	12043.92
HUMANSOFT HOLDING CO KSC	2842.00	5.69%	AL-AHLEIA INSURANCE CO SAKP	782.00	-7.89%	INTL FINANCIAL ADVISORS	333.00	10549.74
HAYAT COMMUNICATIONS	82.20	5.12%	WETHAQ TAKAFUL INSURANCE CO	40.60	-7.73%	AGILITY	279.00	9737.32
AMAR FINANCE & LEASING CO	62.90	5.01%	AQAR REAL ESTATE INVESTMENTS	57.00	-7.32%	ARZAN FINANCIAL GROUP FOR FI	186.00	8850.33

Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24825600 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net
Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24817205 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net

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.