

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

28/08/2024



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	3,647.30	0.2	15.1	22.6	20.8	3.5	2.9	1.79%
MSCI Emerging Markets Index	1,099.77	(0.4)	7.4	15.3	15.1	1.8	1.7	2.67%
MSCI FM FRONTIER MARKETS	541.54	(0.1)	6.8	12.2	12.8	1.6	1.7	4.35%

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	534.85	0.1	0.7	10.0	14.2	1.6	1.7	4.40%
Muscat Stock Exchange MSX 30 Index	4,720.24	0.6	4.6	12.1	12.1	0.9	0.8	5.30%
Tadawul All Share Index	12,109.74	(0.6)	1.2	20.2	22.2	2.4	2.3	3.63%
Dubai Financial Market General Index	4,325.79	(0.4)	6.6	8.4	11.3	1.3	1.1	5.55%
FTSE ADX GENERAL INDEX	9,292.15	(0.4)	(3.0)	16.9	21.2	2.6	2.2	2.09%
Qatar Exchange Index	10,136.99	(0.5)	(6.4)	11.3	14.5	1.3	1.5	4.27%
Bahrain Bourse All Share Index	1,958.06	1.5	(0.7)	7.3	11.3	0.7	0.9	8.85%
Boursa Kuwait All Share Price Return Ir	7,180.38	(0.1)	5.3	18.8	20.3	1.7	1.5	3.31%

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	575.77	(0.3)	8.9	16.7	17.0	1.8	1.7	2.62%
MSCI AC Asia Ex. Japan Index	702.72	(0.4)	9.5	16.2	16.8	1.7	1.7	0.00%
Nikkei 225	38,371.76	0.2	14.7	23.3	25.4	2.0	1.9	1.70%
S&P/ASX 200	8,071.44	0.0	6.3	19.9	19.2	2.3	2.2	3.67%
Hang Seng Index	17,692.45	(1.0)	3.8	10.0	11.1	1.0	1.1	4.45%
NSE Nifty 50 Index	25,052.35	0.1	15.3	24.5	24.7	4.0	3.4	1.23%

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	173.94	0.2	8.3	15.6	16.4	2.1	1.9	3.27%
MSCI Emerging Markets Europe Index	129.14	0.4	10.1	7.3	7.1	1.2	1.0	4.26%
FTSE 100 Index	8,334.79	(0.1)	7.8	14.4	14.3	1.9	1.7	3.90%
Deutsche Boerse AG German Stock Inc	18,827.06	0.8	12.4	15.4	15.7	1.7	1.6	2.93%
CAC 40	7,600.54	0.5	0.8	14.3	16.6	1.9	1.8	3.28%

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	5,560.74	0.1	17.2	26.3	23.2	4.8	4.0	1.35%
S&P 500 INDEX	5,625.80	0.2	17.9	26.3	23.0	5.1	4.2	1.30%
Dow Jones Industrial Average	41,250.50	0.0	9.4	23.0	20.5	5.3	4.6	1.78%
NASDAQ Composite Index	17,754.82	0.2	18.3	40.4	37.6	6.9	5.8	0.74%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	544.54	-0.9	1.7	-34%	139%
Gold Spot \$/Oz	2,502.37	-0.9	21.3	-1%	138%
BRENT CRUDE FUTR Oct24	78.22	-1.7	3.5	-12%	72%
Generic 1st'OQA' Future	77.34	-0.4	1.3	-39%	319%
LME COPPER 3MO (\$)	9,448.00	1.7	10.4	-13%	118%
SILVER SPOT \$/OZ	29.40	-1.9	23.6	-8%	145%

Source: FSC

I CR No. 1287869 | Tel: +968 24825600 | Fax: +968 24817205 | Email: info@fscoman.net | Web: www.fscoman.com

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,720.24							
Change	29.12	0.62%						
Previous Close	4,691.12		Financial Sector	7,652.41	7,615.45	0.49%	0.72%	3.51%
Open	4,694.44		Industry Sector	5,849.30	5,864.26	-0.26%	-1.51%	6.83%
Day's High	4,723.41		Services Sector	1,826.78	1,821.09	0.31%	0.41%	16.69%
Day's Low	4,694.31		MSM Shariah Index	445.84	439.39	146.70%	-	-
YTD Change	4.57%							
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
MUSANDAM POWER	0.286	10.00%	OMAN FISHERIES	0.037	-7.50%	SEMBCORP SALALAH	0.104	0.25
CONSTRUCTION MATERIAL INDUSTRI	0.047	4.44%	NATIONAL GAS	0.100	-4.76%	OMAN NATIONAL EI	0.115	1.00
SOHAR INTERNATIONAL BANK	0.139	3.73%	ALJAZEERA SERVICES	0.209	-2.79%	THE PEARL REIF	0.119	1.77
OMAN INVESTMENT & FINANCE	0.076	2.70%	JAZEERA STEEL PRODUCTS	0.278	-2.46%	DHOFAR INSURANCI	0.230	2.03
OMAN NATIONAL ENGINEERING & IN	0.115	1.77%	OMAN ARAB BANK	0.144	-1.37%	OMAN CEMENT	0.399	2.34

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,109.74							
Change	-72.46	-0.59%	Tadawul Banks	11,883.40	12,047.22	-1.36%	-2.63%	-2.54%
Previous Close	12,182.20		Tadawul Energy	5,260.19	5,278.91	-0.35%	0.31%	0.61%
Open	12,178.74		Tadawul Utilities	14,383.60	14,401.55	-0.12%	-0.20%	4.15%
Day's High	12,209.37		Tadawul Telecom	8,039.40	8,177.69	-1.69%	3.15%	5.61%
Day's Low	12,086.68		Tadawul Insurance	11,459.51	11,462.61	-0.03%	-1.34%	2.77%
YTD Change	1.19%		Tadawul Retailing	7,724.83	7,736.92	-0.16%	-1.48%	1.83%
Volume Mn	274,982.19		Tadawul Food & Beverages	5,950.48	5,944.20	0.11%	0.53%	-3.79%
Value Traded Mn	8,425.93		Tadawul Media	31,990.82	31,548.43	1.40%	2.97%	-0.68%
Traded / Listed Stocks	238	228	Tadawul Materials	5,703.96	5,711.54	-0.13%	0.50%	-2.00%
			Tadawul Capital Goods	13,222.33	13,103.49	0.91%	0.18%	4.45%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
RED SEA INTERNATIONAL CO	44.75	8.09%	MOHAMMED HASAN AL NAQOOL SON	35.20	-4.86%	SAUDI ARABIAN OIL C	27.75	13203.42
CHUBB ARABIA COOPERATIVE INS	42.65	5.57%	LADUN INVESTMENT CO	3.55	-3.53%	TOURISM ENTERPRIS	0.87	11291.97
SAUDI REAL ESTATE CO	23.56	4.53%	AL RAJHI CO FOR CO-OPERATIVE	209.60	-2.96%	AL-BAHA DEVELOPMI	0.12	6428.74
HERFY FOOD SERVICES CO	27.95	4.29%	THE SAUDI NATIONAL BANK	35.10	-2.64%	SAUDI TELECOM CO	42.60	6418.23
AL YAMAMAH STEEL INDUSTRIES	35.9	3.61%	SAUDI TADAWUL GROUP HOLDING	240.00	-2.36%	THE SAUDI NATIONAL	35.10	6349.47

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,325.79							
Change	-17.43	-0.40%						
Previous Close	4,343.22		Real Estate & Construction	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
Open	4,344.04		Banking	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
			Investment and Financial	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
Day's High	4,361.47		Insurance	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
Day's Low	4,319.84		Consumer Staples	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
YTD Change	0.07		Services	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
			Industrial	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
Volume Mn	101,388.01		Telecommunication	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/VALUE
Value Traded Mn	315.43		Transportation	R/A/N/A	R/A/N/A	R/VALUE	R/VALUE	R/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
DUBAI NATIONAL INSURANCE	4.95	10.00%	AMANAT HOLDINGS PJSC	1.15	-2.54%	DRAKE & SCULL INTEI	0.40	51,986.63
SHUAA CAPITAL PSC	0.238	3.03%	EMAAR DEVELOPMENT PJSC	8.5	-1.73%	UNION PROPERTIES F	0.35	24,053.54
DEYAAR DEVELOPMENT PJSC	0.69	1.62%	DRAKE & SCULL INTERNATIONAL	0.398	-1.73%	SHUAA CAPITAL PSC	0.24	18,763.21
AL SALAM BANK SUDAN	0.609	1.50%	EMAAR PROPERTIES PJSC	8.42	-1.64%	DEYAAR DEVELOPME	0.69	15,910.48
ARAMEX PJSC	2.43	1.25%	AJMAN BANK PJSC	1.77	-1.12%	EMAAR PROPERTIES I	8.42	8,322.06

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,292.15							
Change	-41.83	-0.45%						
Previous Close	9,333.98		Financial	16,580.61	16,636.46	-0.34%	-1.05%	-0.65%
Open	9,333.98		Telecommunication	4,272.22	4,358.76	-1.99%	-1.89%	5.17%
Day's High	9,349.33		Consumer Services	14,421.89	14,353.99	0.47%	0.47%	-3.39%
Day's Low	9,289.24		Basic Material	4,751.37	4,752.64	-0.03%	0.23%	2.74%
YTD Change	-2.98%		Industrials	2,608.24	2,605.37	0.11%	1.08%	0.33%
			Utilities	10,329.83	10,250.37	0.78%	0.00%	-4.76%
Volume Mn	168,924.07		Energy	2,062.65	2,074.69	-0.58%	-0.38%	0.73%
Value Traded Mn	748.64		Health Care	2,641.46	2,659.02	-0.66%	-1.73%	-7.36%
Traded / Listed Stocks	72	84	Real Estate	10,397.14	10,412.18	-0.14%	0.65%	-3.47%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
AL DHAFRA INSURANCE CO. P.S.	6.14	13.70%	RAS AL KHAIMA POULTRY	1.51	-3.82%	ADNOC DRILLING CO	4.46	22541.46
ALKHALEJ INVESTMENT	2.36	11.32%	RAS AL KHAIMAH WHITE CEMENT	1.02	-3.77%	MULTIPLY GROUP	2.15	17651.88
APEX INVESTMENT CO PSC	2.12	4.43%	GULF CEMENT CO	0.58	-3.33%	ESHRAQ INVESTMEN'	0.31	9571.48
FERTIGLOBE PLC	2.54	2.01%	GULF PHARMACEUTICAL IND PSC	0.939	-2.69%	ABU DHABI NATIONA	2.60	8152.84
NATIONAL BANK OF RAS AL-KHAI	5.34	1.71%	SHARJAH CEMENT & INDUS DEVEL	0.584	-2.67%	APEX INVESTMENT C	2.12	8010.07

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,136.99							
Change	-51.58	-0.51%	Total Return	23,083.13	23,200.58	-0.51%	0.14%	0.38%
Previous Close	10188.57		Rayan Islamic	4,737.15	4,761.37	-0.51%	0.22%	0.16%
Open	10188.57		All Share	3,600.55	3,620.56	-0.55%	0.30%	0.45%
			Banks & Finance	4,344.28	4,379.45	-0.80%	0.23%	0.49%
Day's High	10195.91		Industrials	4,181.81	4,203.91	-0.53%	-0.09%	-0.36%
Day's Low	10078.4		Transportation	5,441.15	5,444.27	-0.06%	0.26%	-1.41%
YTD Change	-0.06404426		Real Estate	1,518.07	1,520.99	-0.19%	2.20%	-0.95%
			Insurance	2,327.69	2,338.01	-0.44%	0.91%	2.29%
Volume Mn	181.916		Telecommunications	1,735.59	1,737.83	-0.13%	0.84%	6.15%
Value Traded Mn	432.7749		Consumer Goods	7,670.81	7,671.04	0.00%	0.42%	1.10%
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
QATAR GENERAL INSURANCE & RE	1.14	4.39%	QLM LIFE & MEDICAL INSURANCE	2.29	-4.78%	QATAR ALUMINIUM A	1.28	26350.57
QATAR FUEL QSC	14.89	0.61%	LESHA BANK LLC	1.33	-2.49%	LESHA BANK LLC	1.33	25611.75
WIDAM FOOD CO	2.91	0.45%	MEDICARE GROUP	4.22	-2.22%	MAZAYA REAL ESTAT	0.60	22304.14
QATAR EXCHANGE INDEX ETF	9.77	0.41%	MASRAF AL RAYAN	2.25	-1.92%	MASRAF AL RAYAN	2.25	12916.67
MEKDAM HOLDING GROUP	3.64	0.33%	MAZAYA REAL ESTATE DEVELOPME	0.60	-1.81%	VODAFONE QATAR	1.79	6962.17

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,958.06							
Change	29.87	1.55%						
Previous Close	1,928.19		MSCI Bahrain	158.04	157.78	0.16%	-0.11%	-2.47%
Open	1,932.21		MSCI Bahrain Domestic Islamic	61.02	60.74	0.47%	0.00%	-2.45%
Day's High	1959.300		MSCI Bahrain Net TR USD	431.65	429.96	0.39%	0.12%	-1.25%
Day's Low	1932.210							
YTD Change	-0.68%							
Volume Mn	5,046.06							
Value Traded Mn	3.971							
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
ALUMINIUM BAHRAIN BSC	1.12	7.73%	AL SALAM BANK BSC	0.21	-0.47%	GFH FINANCIAL GROU	0.34	281.96
BAHRAIN DUTY FREE COMPLEX	0.48	1.05%	-	-	-	ALUMINIUM BAHRAII	1.12	232.25
GFH FINANCIAL GROUP BSC	0.34	0.90%	-	-	-	BAHRAIN NATIONAL I	0.50	126.35
SOLIDARITY BAHRAIN BSC	0.35	0.57%	-	-	-	SEEF PROPERTIES	0.12	90.00
-	-	-	-	-	-	SOLIDARITY BAHRAIN	0.35	90.00

Source: FSC

ICR No. 1287869 | Tel: +968 24825600 | Fax: +968 24817205 | Email: info@fscoman.net | Web: www.fscoman.com

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,180.38							
Change	-7.78	-0.11%	Industrials	759.88	764.47	-0.60%	-3.20%	-16.30%
Previous Close	7,188.16		Banks	1,775.95	1,777.75	-0.10%	-1.57%	7.80%
Open	7,194.89		Consumer Service	1,011.03	1,024.03	-1.27%	2.89%	53.52%
			Technology	1,622.32	1,535.02	5.69%	-0.45%	180.50%
Day's High	7,229.11		Real Estate	1,342.09	1,345.14	-0.23%	0.66%	10.65%
Day's Low	7,179.66		Financial Services	1,399.21	1,401.87	-0.19%	2.54%	15.43%
YTD Change	5.33%		Telecom	1,015.63	1,011.20	0.44%	2.35%	-8.10%
			Health Care	441.42	441.42	0.00%	-5.68%	-8.45%
Volume Mn	0.29		Insurance	1,995.48	1,995.23	0.01%	-15.94%	-12.97%
Value Traded Mn	72.01		Basic Materials	821.66	804.49	2.13%	9.55%	10.15%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
REAL ESTATE TRADE CENTERS CO	80.00	12.36%	NATIONAL PETROLEUM SERVICES	860.00	-5.49%	INTL FINANCIAL ADVI	350.00	18736.89
KUWAIT & MIDDLE EAST FIN INV	98.30	7.20%	KUWAIT BUSINESS TOWN REAL ES	61.00	-5.28%	KUWAIT FINANCE HC	725.00	17145.33
MENA REAL ESTATE CO	87.80	6.55%	AL TAMDEEN INVESTMENT CO	941.00	-4.95%	WARBA BANK KSCP	200.00	16888.51
AUTOMATED SYSTEMS CO KSCC	223.00	5.69%	AMAR FINANCE & LEASING CO	57.00	-4.84%	GULF BANK	317.00	13991.54
KUWAIT REAL ESTATE HOLDING C	32.40	4.52%	ENERGY HOUSE HOLDING CO KSCP	89.90	-4.36%	AL SAFAT INVESTMEP	104.00	10949.13

Source: FSC

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.