

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

14/07/2025



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	4,046.84	(0.4)	9.1	23.4	21.5	3.8	3.1	1.71%
MSCI Emerging Markets Index	1,229.13	(0.2)	14.3	16.1	15.2	2.0	1.7	2.60%
MSCI FM FRONTIER MARKETS	645.52	0.6	21.2	-	12.6	1.7	1.7	3.84%

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	647.58	0.1	13.7	11.3	13.9	1.8	1.7	4.20%
Muscat Stock Exchange MSX 30 Index	4,626.57	0.1	1.1	8.3	12.5	0.9	0.8	6.18%
Tadawul All Share Index	11,181.61	(0.6)	(7.1)	17.3	22.1	2.1	2.4	4.18%
Dubai Financial Market General Index	5,843.31	(0.2)	13.3	10.2	11.5	1.7	1.2	5.07%
FTSE ADX GENERAL INDEX	10,045.45	(0.2)	6.7	20.3	22.2	2.6	2.4	2.26%
Qatar Exchange Index	10,769.65	(0.6)	1.9	12.0	14.0	1.4	1.5	4.56%
Bahrain Bourse All Share Index	1,952.11	(0.4)	(1.7)	13.3	11.5	1.4	1.0	4.02%
Boursa Kuwait All Share Price Return Ir	8,622.47	(0.0)	17.1	21.3	21.2	1.5	1.6	3.11%

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	646.09	(0.0)	13.5	17.2	17.1	2.0	1.8	2.54%
MSCI AC Asia Ex. Japan Index	802.80	(0.0)	14.0	16.7	16.8	1.9	1.7	0.00%
Nikkei 225	39,459.62	(0.3)	(1.1)	18.3	25.3	2.1	1.9	1.93%
S&P/ASX 200	8,570.40	(0.1)	5.0	21.0	19.5	2.4	2.2	3.41%
Hang Seng Index	24,203.32	0.3	20.7	11.6	10.9	1.3	1.1	3.24%
NSE Nifty 50 Index	25,082.30	(0.3)	6.1	24.2	24.2	3.5	3.4	1.27%

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	182.81	(1.0)	7.6	15.7	16.3	2.1	2.0	3.17%
MSCI Emerging Markets Europe Index	160.34	(0.0)	35.4	11.7	8.1	1.4	1.1	3.32%
FTSE 100 Index	8,977.14	0.4	9.8	13.5	14.1	2.0	1.8	3.42%
Deutsche Boerse AG German Stock Inc	24,033.51	(0.9)	20.7	20.8	15.7	2.0	1.7	2.47%
CAC 40	7,793.52	(0.5)	5.6	16.1	16.0	1.9	1.8	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	6,220.06	(0.3)	6.8	26.8	24.2	5.1	4.3	1.27%
S&P 500 INDEX	6,259.75	(0.3)	6.4	26.6	24.1	5.3	4.5	1.23%
Dow Jones Industrial Average	44,371.51	(0.6)	4.3	23.6	21.6	5.6	4.8	1.64%
NASDAQ Composite Index	20,585.53	(0.2)	6.6	42.4	39.3	7.3	6.1	0.67%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	551.39	1.0	0.3	-33%	142%
Gold Spot \$/Oz	3,371.69	0.5	28.5	-2%	221%
BRENT CRUDE FUTR Sep25	71.37	1.4	-1.7	-14%	53%
Generic 1st'OQA' Future	72.59	1.3	-4.6	-42%	293%
LME COPPER 3MO (\$)	9,660.50	-0.4	10.2	-11%	123%
SILVER SPOT \$/OZ	38.99	1.5	34.9	0%	225%

Source: FSC

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Muscat Stock Exchange

Close	4,626.57		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	4.31	0.09%						
Previous Close	4,622.26		Financial Sector	8,042.98	8,010.02	0.41%	2.46%	4.10%
Open	4,622.35		Industry Sector	6,810.98	6,825.94	-0.22%	5.29%	29.22%
Day's High	4,628.47		Services Sector	1,700.21	1,712.73	-0.73%	6.30%	-2.46%
Day's Low	4,569.88							
YTD Change	1.09%							
Volume Mn	66.59							
MSX30 Value Traded Mn	10.54							
Traded Securities	67							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN EDUCATION & TRAINING INVES	1.320	10.00%	AL MADINA INVESTMENT HOLDING	0.043	-8.51%	OQ BASE INDUSTRIES	0.129	22902.38
MUSCAT INSURANCE	0.726	10.00%	OMAN OIL MARKETING	0.640	-4.48%	SOHAR INTERNATION	0.140	10242.38
DHOFAR FOODS AND INVESTMENT	0.078	9.86%	VOLTAMP ENERGY	0.860	-3.37%	ASYAD SHIPPING	0.130	7881.86
NATIONAL DETERGENT	0.730	8.15%	GALFAR ENGINEERING & CONTRACTING	0.066	-2.94%	BANK MUSCAT	0.272	7625.25
NATIONAL FINANCE	0.127	7.63%	AL ANWAR CERAMIC	0.177	-2.75%	OQ GAS NETWORKS	0.153	4150.87

Saudi Exchange

Close	11,181.61		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-71.29	-0.63%	Tadawul Banks	12,355.37	12,433.30	-0.63%	-0.57%	0.70%
Previous Close	11,252.90		Tadawul Energy	4,713.40	4,736.77	-0.49%	-0.79%	2.05%
Open	11,255.01		Tadawul Utilities	9,019.81	9,007.23	0.14%	-1.59%	-3.68%
Day's High	11,257.42		Tadawul Telecom	8,389.54	8,437.20	-0.56%	-0.40%	-0.65%
Day's Low	11,166.87		Tadawul Insurance	9,243.28	9,371.32	-1.37%	-1.73%	-3.91%
YTD Change	-7.10%		Tadawul Retailing	7,655.22	7,677.54	-0.29%	-0.42%	1.42%
Volume Mn	251,181.19		Tadawul Food & Beverages	4,971.74	4,978.70	-0.14%	-0.38%	-3.19%
Value Traded Mn	4,960.20		Tadawul Media	21,929.94	22,339.99	-1.84%	-2.77%	-2.45%
Traded / Listed Stocks	256	228	Tadawul Materials	5,204.03	5,238.47	-0.66%	-0.97%	1.29%
			Tadawul Capital Goods	15,173.70	15,265.52	-0.60%	-1.03%	0.65%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SHL FINANCE CO	22.38	5.27%	AL HASOOB CO	43.20	-6.09%	TOURISM ENTERPRIS	0.92	29548.12
OBEIKAN GLASS COMPANY	38.5	3.22%	ADVANCE INTERNATIONAL COMMUN	2.59	-4.07%	BATIC INVESTMENTS	2.44	10598.08
AL-HASSAN G.I. SHAKER CO	29	3.06%	EMAAR ECONOMIC CITY	13.74	-4.05%	SAUDI CHEMICAL CO	7.62	7285.19
SAUDI IND INVESTMENT GROUP	17.11	2.70%	AL JOUF MINERAL WATER BOTTLI	1.45	-3.97%	SAUDI DARB INVESTM	3.44	6090.26
SAUDI CERAMIC CO	33.7	2.12%	ARABIAN FOOD & DAIRY FACTORI	67.15	-3.93%	ARABIAN CENTRES CC	21.72	4467.82

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,843.31							
Change	-11.68	-0.20%						
Previous Close	5,854.99		Real Estate & Construction	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
Open	5,854.99		Banking	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
			Investment and Financial	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
Day's High	5,880.27		Insurance	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
Day's Low	5,828.45		Consumer Staples	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
YTD Change	0.13		Services	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
			Industrial	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
Volume Mn	271,061.68		Telecommunication	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
Value Traded Mn	682.25		Transportation	8,413.80	8,413.80	-0.01%	-0.01%	-0.01%
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
AL FIRDOUS HOLDINGS PJSC	0.305	5.54%	DUBAI REFRESHMENTS COMPANY	19.25	-8.77%	UNION PROPERTIES F	0.92	116,752.93
UNION PROPERTIES PJSC	0.918	3.38%	COMMERCIAL BANK OF DUBAI	8.8	-2.33%	DRAKE & SCULL INTEI	0.36	80,493.25
AMLAQ FINANCE	1.62	3.18%	ARAMEX PJSC	2.69	-1.47%	SHUAA CAPITAL PSC	0.27	38,440.82
GULF NAVIGATION HOLDING PJSC	6.06	1.85%	ISLAMIC ARAB INSURANCE COM	0.411	-1.44%	AL FIRDOUS HOLDING	0.31	26,220.67
DUBAI ELECTRICITY & WATER AU	2.81	1.44%	DUBAI INVESTMENTS PJSC	2.76	-1.43%	GULF NAVIGATION H	6.06	20,859.35

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,045.45							
Change	-19.36	-0.19%						
Previous Close	10,064.81		Financial	18,136.74	18,181.51	-0.25%	-0.25%	0.40%
Open	10,064.81		Telecommunication	4,420.93	4,412.07	0.20%	0.20%	1.97%
			Consumer Services	8,683.14	8,777.80	-1.08%	-1.08%	0.60%
Day's High	10,079.99		Basic Material	4,834.58	4,869.07	-0.71%	-0.71%	2.67%
Day's Low	10,034.48		Industrials	2,639.39	2,646.55	-0.27%	-0.27%	0.58%
YTD Change	6.65%		Utilities	13,269.85	13,269.85	0.00%	0.00%	-4.84%
			Energy	2,280.47	2,293.87	-0.58%	-0.58%	-0.43%
Volume Mn	487,771.95		Health Care	2,097.34	2,124.88	-1.30%	-1.30%	7.66%
Value Traded Mn	1,273.39		Real Estate	14,045.81	13,886.90	1.14%	1.14%	6.50%
Traded / Listed Stocks	76	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
ESHRAQ INVESTMENTS PJSC	0.537	6.13%	ABU DHABI NATIONAL TAKAFUL C	4.3	-9.09%	ESHRAQ INVESTMEN	0.54	113518.87
CHIMERA S&P KWT SHARIAH ET-B	3.88	4.58%	RESPONSE PLUS HOLDING PJSC	4.11	-2.38%	MANAZEL REAL ESTA	0.37	39360.56
GULF PHARMACEUTICAL IND PSC	1.49	2.05%	FUJAIH CEMENT INDUSTRIES	0.561	-2.09%	RAK PROPERTIES	1.45	31238.64
MANAZEL REAL ESTATE PJSC	0.37	1.65%	GHITHA HOLDING PJSC	27.06	-2.03%	MULTIPLY GROUP	2.45	16242.66
CHIMERA S&P UAE SHI ETF A	9.39	1.19%	EASY LEASE MOTOR CYCLE PRJSC	28.32	-1.67%	ALDAR PROPERTIES P	9.52	11928.51

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Qatar Stock Exchange

Close	10,769.65		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-61.07	-0.56%	Total Return	25,406.63	25,550.70	-0.56%	-0.53%	0.19%
Previous Close	10830.72		Rayan Islamic	5,130.25	5,147.99	-0.34%	-0.13%	0.30%
Open	10830.72		All Share	3,978.24	3,999.17	-0.52%	-0.55%	0.06%
			Banks & Finance	4,966.17	4,994.16	-0.56%	-0.68%	0.24%
Day's High	10830.72		Industrials	4,331.99	4,349.13	-0.39%	-0.44%	1.29%
Day's Low	10760.63		Transportation	5,709.79	5,756.20	-0.81%	-0.91%	-2.66%
YTD Change	0.01878336		Real Estate	1,620.51	1,625.19	-0.29%	-0.05%	-1.05%
			Insurance	2,416.21	2,426.27	-0.41%	-0.20%	-2.73%
Volume Mn	101.227		Telecommunications	2,152.29	2,167.03	-0.68%	-0.15%	-1.46%
Value Traded Mn	346.3145		Consumer Goods	8,184.98	8,209.45	-0.30%	-0.08%	1.66%
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
AL AHLI BANK	3.81	1.46%	QATAR CINEMA & FILM DISTRIB	2.40	-1.88%	ESTITHMAR HOLDING	3.40	14204.39
ESTITHMAR HOLDING QPSC	3.40	1.46%	MANNAI CORPORATION QPSC	5.87	-1.68%	BALADNA	1.28	9758.99
AL MEERA CONSUMER GOODS CO	14.76	0.55%	QATAR & OMAN INVESTMENT CO	0.66	-1.49%	EZDAN HOLDING GR	1.05	9297.13
WIDAM FOOD CO	2.22	0.45%	DOHA BANK QPSC	2.50	-1.38%	AL RAYAN BANK	2.33	6942.97
SALAM INTERNATIONAL INVESTME	0.68	0.44%	QATAR GAS TRANSPORT(NAKILAT)	4.79	-1.38%	MESAIEED PETROCHE	1.33	4272.86

Bahrain Bourse

Close	1,952.11		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-6.99	-0.36%	MSCI Bahrain	165.95	166.21	-0.15%	-0.15%	2.94%
Previous Close	1,959.10		MSCI Bahrain Domestic Islamic	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	1,959.10		MSCI Bahrain Net TR USD	471.90	471.94	-0.01%	0.00%	3.12%
Day's High	1961.100							
Day's Low	1951.990							
YTD Change	-1.70%							
Volume Mn	4,531.11							
Value Traded Mn	0.978							
Traded / Listed Stocks	38	42						Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
ITHMAAR HOLDING BSC	0.03	9.68%	SOLIDARITY BAHRAIN BSC	0.39	-2.28%	AL SALAM BANK BSC	0.23	1746.41
SEEF PROPERTIES	0.12	5.98%	NATIONAL HOTELS CO	0.24	-2.08%	ITHMAAR HOLDING B	0.03	731.00
ZAIN BAHRAIN BSCC	0.12	0.85%	ALUMINIUM BAHRAIN BSC	0.96	-2.04%	SEEF PROPERTIES	0.12	336.40
BBK BSC	0.50	0.80%	AL SALAM BANK BSC	0.23	-0.43%	NATIONAL BANK OF B	0.50	191.64
NATIONAL BANK OF BAHRAIN BSC	0.50	0.20%	ARAB BANKING CORP BSC-\$US	0.36	-0.28%	ZAIN BAHRAIN BSCC	0.12	185.00

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Boursa Kuwait

Close	8,622.47		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-1.93	-0.02%	Industrials	690.06	681.88	1.20%	-4.01%	-4.64%
Previous Close	8,624.40		Banks	2,211.47	2,209.78	0.08%	2.28%	22.19%
Open	8,629.72		Consumer Service	1,276.39	1,316.80	-3.07%	-4.04%	27.81%
			Technology	1,615.05	1,600.50	0.91%	46.05%	55.25%
Day's High	8,635.62		Real Estate	1,778.54	1,797.64	-1.06%	0.54%	31.44%
Day's Low	8,570.95		Financial Services	1,584.30	1,591.36	-0.44%	2.89%	4.88%
YTD Change	17.11%		Telecom	1,112.16	1,100.52	1.06%	5.69%	9.28%
			Health Care	524.50	520.75	0.72%	-7.94%	14.45%
Volume Mn	0.91		Insurance	1,968.92	1,973.71	-0.24%	3.50%	-4.20%
Value Traded Mn	119.65		Basic Materials	877.17	881.73	-0.52%	2.54%	-3.74%
Traded / Listed Stocks	140	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
EKTTITAB HOLDING CO SAK	25.00	50.60%	REAL ESTATE TRADE CENTERS CO	1232.00	-18.41%	FIRST INVESTMENT C	78.30	197607.01
ALIMTIAZ INVESTMENT GROUP	47.80	18.32%	GULF FRANCHISING HOLDING CO	245.00	-8.24%	EKTTITAB HOLDING C	25.00	149862.96
FIRST INVESTMENT CO KSCC	78.30	8.75%	CREDIT RATING & COLLECTION	79.00	-8.14%	ALIMTIAZ INVESTMEI	47.80	115476.68
KUWAIT REAL ESTATE HOLDING C	51.80	8.60%	UNICAP INVESTMENT AND FINANC	323.00	-5.00%	MANAZEL HOLDING	43.90	39259.93
MANAZEL HOLDING	43.90	7.60%	GULF INVESTMENT HOUSE KSC	510.00	-4.85%	KUWAIT BUSINESS TC	115.00	24524.72

Source: FSC