

## Financial Services Company GCC Daily Report

20-Mar-23

2023

### Research Department

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# FSC Daily Report

20/03/2023

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	2,656.19	(0.8)	2.1	17.0	20.1	2.7	2.6	2.27%
MSCI Emerging Markets Index	951.56	1.1	(0.5)	12.2	14.8	1.6	1.6	3.23%
MSCI FM FRONTIER MARKETS	473.82	(0.1)	0.3	9.6	13.5	1.4	1.9	4.51%

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	522.04	0.2	(6.5)	11.9	11.7	1.3	1.7	3.46%
Muscat Stock Exchange MSX 30 Index	4,860.01	(0.2)	0.1	11.2	10.6	0.8	0.8	3.55%
Tadawul All Share Index	10,169.47	0.1	(2.9)	15.2	21.7	2.3	2.1	2.87%
Dubai Financial Market General Index	3,344.12	(0.2)	0.2	8.9	12.3	1.1	1.0	3.58%
FTSE ADX GENERAL INDEX	9,545.34	(1.1)	(6.5)	23.2	16.2	2.5	1.9	2.27%
Qatar Exchange Index	9,778.27	(1.3)	(8.5)	11.1	14.9	1.3	1.5	5.06%
Bahrain Bourse All Share Index	1,886.35	(0.6)	(0.5)	6.1	12.0	0.6	1.0	6.10%
Boursa Kuwait All Share Price Return Ir	7,013.14	(0.7)	(3.8)	16.7	20.5	1.1	1.5	3.58%

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	506.17	1.5	0.1	14.4	16.6	1.6	1.7	3.14%
MSCI AC Asia Ex. Japan Index	621.82	1.6	0.4	14.5	16.4	1.5	1.6	0.00%
Nikkei 225	26,945.67	(1.4)	3.3	22.4	21.7	1.7	1.8	2.22%
S&P/ASX 200	6,898.51	(1.4)	(2.0)	11.4	19.2	2.0	2.1	4.71%
Hang Seng Index	19,000.71	(2.7)	(3.9)	11.1	11.8	1.1	1.2	4.39%
NSE Nifty 50 Index	16,988.40	(0.7)	(6.2)	20.7	24.9	2.9	2.9	1.49%

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	146.55	(1.2)	2.8	13.2	16.8	1.8	1.7	3.53%
MSCI Emerging Markets Europe Index	92.00	(1.4)	(1.8)	6.3	7.2	1.2	0.9	3.59%
FTSE 100 Index	7,352.90	0.2	(1.3)	10.5	15.2	1.6	1.6	4.42%
Deutsche Boerse AG German Stock Ind	14,849.32	0.5	6.6	11.9	15.4	1.5	1.5	3.70%
CAC 40 Index	6,975.66	0.7	7.8	12.2	17.0	1.8	1.6	3.01%

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	3,888.51	(1.1)	2.0	18.7	22.2	3.7	3.7	1.81%
S&P 500 INDEX	3,916.64	(1.1)	2.0	18.8	22.0	3.9	3.8	1.76%
Dow Jones Industrial Average	31,861.98	(1.2)	(3.9)	18.9	19.2	4.2	4.4	2.20%
NASDAQ Composite Index	11,630.51	(0.7)	11.1	34.0	35.2	4.9	5.2	0.92%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	541.62	-0.7	-11.2	-34%	137%
Gold Spot \$/Oz	1,980.50	-0.4	8.6	-4%	88%
BRENT CRUDE FUTR May23	72.14	-1.1	-15.4	-32%	71%
Generic 1st'OQA' Future	70.35	-3.0	-10.9	-44%	281%
LME COPPER 3MO (\$)	8,580.00	0.7	2.5	-20%	98%
SILVER SPOT \$/OZ	22.43	-0.8	-6.4	-23%	87%

Source: FSC

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## Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,860.01							
Change	-11.82	-0.24%						
Previous Close	4,871.82		Financial Sector	7,794.16	7,813.30	-0.24%	1.60%	-1.38%
Open	4,875.36		Industry Sector	6,121.74	6,172.79	-0.83%	3.02%	-4.75%
Day's High	4,875.36		Services Sector	1,714.39	1,695.62	1.11%	0.02%	6.05%
Day's Low	4,833.94		MSM Shariah Index	487.26	486.47	16.00%	-	-
YTD Change	0.05%							
Volume Mn	11.72							
MSX30 Value Traded Mn	2.82							
Traded / Listed Stocks	49	114						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
AL MADINA INVESTMENT HOLDING	0.030	20.00%	TAKAFUL OMAN	0.039	-9.30%	ABRAJ ENERGY SERVICES	0.295	5109.61
AL HASSAN ENG.	0.013	8.33%	GULF MUSHROOM P	0.211	-8.26%	BANK MUSCAT	0.288	2082.70
AL MAHA PETROLEUM PRODUCTS MA	1.140	7.55%	OMAN REIT FUND	0.072	-7.69%	OMAN TELECOM	1.050	680.02
AL BATINAH DEV.	0.062	6.90%	OMAN CABLES INDSTR	1.550	-6.91%	BANK NIZWA	0.099	462.21
SHELL OMAN MRK.	0.864	6.40%	ASAFFA FOODS	0.190	-5.00%	UNITED FINANCE	0.062	158.17

## Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,169.47							
Change	11.74	0.12%	Tadawul Banks	10,476.51	10,461.27	0.15%	3.37%	1.58%
Previous Close	10,157.73		Tadawul Energy	5,311.43	5,296.12	0.29%	0.83%	-1.28%
Open	10,122.74		Tadawul Utilities	6,645.75	6,623.94	0.33%	1.28%	-1.62%
Day's High	10,184.89		Tadawul Telecom	6,704.50	6,724.52	-0.30%	0.09%	4.17%
Day's Low	10,098.31		Tadawul Insurance	5,713.04	5,774.77	-1.07%	-1.10%	-2.15%
YTD Change	-2.95%		Tadawul Retailing	7,220.95	7,251.92	-0.43%	-0.33%	-2.09%
Volume Mn	88,161.99		Tadawul Food & Beverages	4,735.20	4,725.15	0.21%	0.89%	0.97%
Value Traded Mn	3,203.35		Tadawul Media	22,188.90	22,169.93	0.09%	0.86%	0.92%
Traded / Listed Stocks	221	228	Tadawul Materials	6,170.80	6,196.42	-0.41%	1.36%	-1.81%
			Tadawul Capital Goods	5,743.00	5,721.57	0.37%	0.88%	-0.72%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
THIMAR DEVELOPMENT HOLDING	44.35	9.91%	SAUDI PARTS CENTER CO	82.00	-17.17%	THE SAUDI NATIONAL BANK	43.75	9,642.46
SAUDI AZM CO. FOR COMMUNICAT	205.00	9.28%	AL HASOOB CO	227.40	-7.94%	DAR AL ARKAN REAL ESTATE DEV	14.12	5,688.49
ARABIAN INTERNATIONAL HEALTH	48.00	9.09%	NATIONAL ENVIORNMENTAL RECYC	82.00	-7.87%	ALINMA BANK	29.10	5,516.74
ELM CO	438.00	8.42%	MOHAMMED HASAN AL NAQOOL S	55.00	-6.78%	AL RAJHI BANK	73.00	3,651.73
RED SEA INTERNATIONAL CO	26.35	6.25%	AL JOUF MINERAL WATER BOTTLI	29.80	-5.40%	SAUDI ARABIAN OIL CO	31.20	3,541.22

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

## Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	3,344.12							
Change	-5.12	-0.15%						
Previous Close	3,349.24		Real Estate & Construction	#N/A #N/A	#N/A #N/A	#VALUE!	#VALUE!	#VALUE!
Open	3,349.24		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	3,349.24		Insurance	#N/A #N/A	#N/A #N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	3,323.98		Consumer Staples	#N/A #N/A	#N/A #N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.00		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	196,606.91		Telecommunication	#N/A #N/A	#N/A #N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	574.93		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
AJMAN BANK PJSC	1.21	6.14%	DAR AL TAKAFUL	0.65	-9.72%	AJMAN BANK PJSC	1.21	37,139.69
DUBAI ISLAMIC INSURANCE CO	0.81	1.50%	AL FIRDOUS HOLDINGS PJSC	0.11	-8.33%	GULF NAVIGATION HOLDING PJSC	0.91	12,902.17
COMMERCIAL BANK OF DUBAI	4.33	0.93%	AMLAK FINANCE	0.65	-3.56%	EMAAR PROPERTIES PJSC	5.34	8,334.98
DUBAI INVESTMENTS PJSC	2.25	0.90%	UNION PROPERTIES PJSC	0.213	-3.18%	DUBAI ELECTRICITY & WATER AU	2.42	8,327.87
EMAAR PROPERTIES PJSC	5.34	0.75%	DUBAI FINANCIAL MARKET PJSC	1.23	-3.15%	AIR ARABIA PJSC	2.23	6,130.79

## Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,545.34							
Change	-104.76	-1.09%						
Previous Close	9,650.10		Financial	16,005.11	16,309.22	-1.86%	-1.86%	-2.33%
Open	9,650.10		Telecommunication	5,776.91	5,630.59	2.60%	2.60%	-8.16%
			Consumer Services	8,664.55	8,806.85	-1.62%	-1.62%	-3.32%
Day's High	9,650.10		Basic Material	5,675.58	5,675.58	0.00%	0.00%	0.62%
Day's Low	9,476.44		Industrials	3,527.66	3,569.51	-1.17%	-1.17%	-3.47%
YTD Change	-6.52%		Utilities	12,762.34	12,998.68	-1.82%	-1.82%	-3.86%
			Energy	2,094.04	2,090.21	0.18%	0.18%	1.36%
Volume Mn	231,883.85		Health Care	3,105.14	3,068.15	1.21%	1.21%	1.54%
Value Traded Mn	1,968.55		Real Estate	6,992.07	7,013.85	-0.31%	-0.31%	0.93%
Traded / Listed Stocks	62	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
HAYAH INSURANCE CO PJSC	0.839	8.96%	GHITHA HOLDING PJSC	68.8	-9.95%	MULTIPLY GROUP	3.40	13616.51
RAS AL KHAIMA POULTRY	2.26	7.11%	NATIONAL MARINE DREDGING CO	33	-5.34%	ALDAR PROPERTIES PJSC	4.76	11070.36
ESG EMIRATES STALLIONS GROU	5.37	4.88%	NATIONAL BANK OF RAS AL-KHAI	4.85	-4.90%	ABU DHABI NATIONAL OIL CO FO	4.30	10339.31
GULF PHARMACEUTICAL IND PSC	0.989	3.02%	SUDATEL TELECOM GROUP LTD	0.38	-3.80%	ABU DHABI PORTS CO PJSC	6.16	7530.98
EMIRATES TELECOM GROUP CO	23.4	2.72%	Q HOLDING PJSC	2.41	-3.60%	ADNOC DRILLING CO PJSC	3.69	7444.36

## Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,778.27							
Change	-130.42	-1.32%	<b>Total Return</b>	20,953.56	21,233.05	-1.32%	-1.23%	-4.49%
Previous Close	9908.69		<b>Rayan Islamic</b>	4,359.29	4,398.08	-0.88%	-1.17%	-3.36%
Open	9926.28		<b>All Share</b>	3,265.09	3,308.75	-1.32%	-1.19%	-4.75%
Day's High	9952.07		<b>Banks &amp; Finance</b>	4,136.13	4,216.27	-1.90%	-1.27%	-5.86%
Day's Low	9754.81		<b>Industrials</b>	3,833.70	3,867.89	-0.88%	-1.42%	-3.95%
YTD Change	-0.0845234		<b>Transportation</b>	3,878.06	3,907.99	-0.77%	-2.68%	-5.29%
Volume Mn	123.4336		<b>Real Estate</b>	1,367.96	1,376.89	-0.65%	-0.59%	-4.03%
Value Traded Mn	377.2599		<b>Insurance</b>	1,818.15	1,810.68	0.41%	0.99%	-7.80%
Traded / Listed Stocks	20	51	<b>Telecommunications</b>	1,367.55	1,367.77	-0.02%	1.56%	2.08%
			<b>Consumer Goods</b>	7,361.92	7,409.07	-0.64%	-1.18%	-1.77%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
QATAR NATIONAL CEMENT CO	4.15	3.73%	QATAR GENERAL INSURANCE & RE	0.80	-6.53%	QATAR ALUMINIUM MANUFACTURING	1.47	15057.49
QATAR INSURANCE CO	1.55	0.98%	QLM LIFE & MEDICAL INSURANCE	3.00	-6.19%	ESTITHMAR HOLDING QPSC	1.58	11499.97
GULF INTERNATIONAL SERVICES	1.60	0.88%	WIDAM FOOD CO	1.23	-5.16%	MASRAF AL RAYAN	2.60	9718.66
MASRAF AL RAYAN	2.60	0.78%	MANNAI CORPORATION QSC	5.35	-4.29%	MAZAYA REAL ESTATE DEVELOPME	0.53	6631.46
QATAR & OMAN INVESTMENT CO	0.51	0.40%	QATAR GERMAN CO FOR MEDICAL	0.80	-3.27%	QATAR INSURANCE CO	1.55	5943.07

## Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,886.35							
Change	-10.65	-0.56%	<b>MSCI Bahrain</b>	137.29	137.11	0.13%	0.13%	-4.32%
Previous Close	1,897.00		<b>MSCI Bahrain Domestic Islamic</b>	50.00	49.76	0.48%	0.48%	-13.23%
Open	1,897.00		<b>MSCI Bahrain Net TR USD</b>	335.88	336.01	-0.04%	0.00%	-2.50%
Day's High	1899.050							
Day's Low	1885.630							
YTD Change	-0.47%							
Volume Mn	1,597.47							
Value Traded Mn	0.338							
Traded / Listed Stocks	43	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
TRAFKO GROUP BSC	0.30	7.14%	ALUMINIUM BAHRAIN BSC	1.00	-4.76%	GFH FINANCIAL GROUP BSC	0.25	865.00
SEEF PROPERTIES	0.16	2.60%	-	-	-	AL SALAM BANK BSC	0.10	855.53
BAHRAIN TELECOM CO	0.46	0.22%	-	-	-	ALUMINIUM BAHRAIN BSC	1.00	487.55
BAHRAIN NATIONAL HOLDING	0.50	0.20%	-	-	-	BBK BSC	0.53	137.75
BBK BSC	0.53	0.19%	-	-	-	NASS CORP BSC	0.05	124.76

## Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,013.14							
Change	-49.03	-0.69%	Industrials	965.48	961.44	0.42%	-2.52%	-10.51%
Previous Close	7,062.17		Banks	1,750.35	1,765.61	-0.86%	-3.29%	-2.43%
Open	7,090.99		Consumer Service	460.05	472.38	-2.61%	-3.87%	-4.15%
			Technology	669.30	640.20	4.55%	-1.18%	-3.87%
Day's High	7,104.15		Real Estate	1,089.13	1,098.93	-0.89%	-4.63%	-9.89%
Day's Low	7,008.24		Financial Services	1,166.58	1,178.12	-0.98%	-5.62%	-7.21%
YTD Change	-3.83%		Telecom	1,150.98	1,151.47	-0.04%	-1.75%	-2.58%
			Health Care	455.49	462.75	-1.57%	-0.99%	-1.38%
Volume Mn	0.13		Insurance	1,640.53	1,669.42	-1.73%	0.80%	5.78%
Value Traded Mn	39.94		Basic Materials	831.60	838.87	-0.87%	-1.48%	-3.87%
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
KUWAIT CO FOR PROCESS PLANT	304.00	7.04%	CREDIT RATING & COLLECTION	18.80	-13.36%	AAYAN LEASING & INVESTMENT	130.00	15,223.15
AQAR REAL ESTATE INVESTMENTS	59.90	5.09%	DAR AL THURAYA REAL ESTATE C	146.00	-9.32%	KUWAIT FINANCE HOUSE	820.00	13,228.39
EKTTITAB HOLDING CO SAK	8.30	5.06%	AJIAL REAL ESTATE ENTMT	254.00	-9.29%	KUWAIT PROJECTS HOLDING	111.00	7,109.02
KUWAIT NATIONAL CINEMA CO	992.00	4.97%	UNICAP INVESTMENT AND FINANC	42.00	-9.09%	KUWAIT INTERNATIONAL BANK	183.00	6,640.99
OULA FUEL MARKETING CO	132.00	4.76%	METAL & RECYCLING CO	61.00	-7.58%	NATIONAL INVESTMENTS CO	236.00	6,101.46

Source: FSC

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