

Financial Services Company
GCC Daily Report



2024

Research Department

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FSC Daily Report

25/09/2024



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	3,702.33	0.4	16.8	22.9	20.9	3.6	2.9	1.77%
MSCI Emerging Markets Index	1,132.04	1.9	10.6	15.4	15.2	1.9	1.7	2.58%
MSCI FM FRONTIER MARKETS	537.57	0.7	6.0	11.9	12.8	1.6	1.7	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	548.03	0.4	3.2	10.3	14.2	1.6	1.7	4.27%
Muscat Stock Exchange MSX 30 Index	4,726.52	0.2	4.7	12.2	12.1	0.9	0.8	5.29%
Tadawul All Share Index	12,278.50	0.1	2.6	20.3	22.3	2.4	2.3	3.54%
Dubai Financial Market General Index	4,476.93	0.3	10.3	8.6	11.3	1.4	1.1	5.36%
FTSE ADX GENERAL INDEX	9,473.98	0.1	(1.1)	17.2	21.3	2.7	2.2	2.07%
Qatar Exchange Index	10,542.71	0.5	(2.7)	11.6	14.4	1.3	1.5	4.03%
Bahrain Bourse All Share Index	2,018.96	(0.3)	2.4	7.9	11.3	0.7	0.9	3.61%
Boursa Kuwait All Share Price Return Ir	7,202.89	0.5	5.7	19.0	20.4	1.7	1.5	3.30%

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	595.59	1.6	12.6	17.1	17.0	1.9	1.7	2.55%
MSCI AC Asia Ex. Japan Index	729.07	2.0	13.6	16.5	16.8	1.8	1.7	0.00%
Nikkei 225	37,870.26	(0.2)	13.2	22.8	25.5	2.0	1.9	1.74%
S&P/ASX 200	8,126.36	(0.2)	7.1	20.8	19.2	2.4	2.2	3.60%
Hang Seng Index	19,129.10	0.7	12.2	10.1	11.0	1.1	1.1	4.18%
NSE Nifty 50 Index	26,004.15	0.2	19.7	25.4	24.7	4.2	3.4	1.18%

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	174.03	0.7	8.3	15.5	16.4	2.1	1.9	3.25%
MSCI Emerging Markets Europe Index	129.50	2.0	10.4	7.4	7.1	1.2	1.0	4.22%
FTSE 100 Index	8,303.68	0.3	7.4	14.6	14.4	1.9	1.7	3.81%
Deutsche Boerse AG German Stock Inc	18,914.97	(0.4)	12.9	15.8	15.6	1.7	1.6	2.91%
CAC 40	7,576.81	(0.4)	0.4	14.1	16.5	1.9	1.8	3.25%

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	5,670.75	0.3	19.5	26.1	23.3	4.9	4.0	1.34%
S&P 500 INDEX	5,732.93	0.3	20.2	26.1	23.1	5.1	4.2	1.28%
Dow Jones Industrial Average	42,208.22	0.2	12.0	22.9	20.6	5.3	4.6	1.76%
NASDAQ Composite Index	18,074.52	0.6	20.4	40.5	38.3	6.8	5.8	0.75%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	541.14	1.3	1.0	-34%	137%
Gold Spot \$/Oz	2,656.29	0.0	28.8	0%	153%
BRENT CRUDE FUTR Nov24	74.72	-0.6	-0.7	-16%	64%
Generic 1st'OQA' Future	75.15	-0.3	-1.5	-40%	307%
LME COPPER 3MO (\$)	9,796.00	2.6	14.5	-10%	126%
SILVER SPOT \$/OZ	31.87	-0.7	33.9	-1%	166%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,726.52							
Change	10.64	0.23%						
Previous Close	4,715.89		Financial Sector	7,764.12	7,720.65	0.56%	0.89%	5.02%
Open	4,715.89		Industry Sector	5,669.59	5,674.05	-0.08%	-3.60%	3.55%
Day's High	4,743.42		Services Sector	1,812.33	1,819.56	-0.40%	-0.63%	15.76%
Day's Low	4,709.04		MSM Shariah Index	445.84	439.39	146.70%	-	-
YTD Change	4.71%							
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
NATIONAL BANK OMAN	0.298	6.43%	ALJAZEERA SERVICES	0.190	-6.40%	GLOBAL FINANCIAL	0.075	0.02
GULF INTERNATIONAL CHEMICALS	0.071	4.41%	SEMBICORP SALALAH	0.107	-1.84%	Liva Conv.Bonds_24	0.099	0.12
MUSCAT THREAD MILLS	0.109	3.81%	UNITED FINANCE	0.056	-1.75%	OMINVEST PERP.B 2	0.820	0.14
GLOBAL FINANCIAL INVESTMENT HO.	0.075	1.35%	OMAN INVESTMENT & FINANCE	0.073	-1.35%	MUSANDAM POWEI	0.267	0.20
ALANWAR INVESTMENT	0.076	1.33%	ALBATINAH POWER	0.075	-1.32%	OMAN INV&FIN SUE	0.091	1.00

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,278.50		Tadawul Banks	12,028.10	12,054.48	-0.22%	0.34%	0.87%
Change	10.08	0.08%	Tadawul Energy	5,239.38	5,219.89	0.37%	0.97%	-1.08%
Previous Close	12,268.42		Tadawul Utilities	15,323.35	15,177.96	0.96%	9.59%	5.10%
Open	12,269.23		Tadawul Telecom	8,253.21	8,265.79	-0.15%	0.17%	2.17%
Day's High	12,306.65		Tadawul Insurance	10,785.15	10,800.13	-0.14%	1.52%	-4.38%
Day's Low	12,244.15		Tadawul Retailing	8,075.01	8,135.23	-0.74%	-1.18%	4.86%
YTD Change	2.60%		Tadawul Food & Beverages	6,288.63	6,268.57	0.32%	1.35%	6.62%
Volume Mn	417,642.93		Tadawul Media	32,676.20	32,912.25	-0.72%	1.40%	2.41%
Value Traded Mn	7,473.96		Tadawul Materials	5,805.91	5,798.85	0.12%	2.93%	1.68%
Traded / Listed Stocks	238	228	Tadawul Capital Goods	13,331.87	13,300.48	0.24%	1.15%	0.77%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SAUDI INDUSTRIAL DEVELOPMENT	31	9.93%	JAHEZ INTERNATIONAL CO	25.10	-2.90%	AL-BAHA DEVELOPMI	0.18	25120.86
SAUDI FISHERIES	27.9	8.35%	NATIONAL MEDICAL CARE CO	213.00	-2.74%	TOURISM ENTERPRIS	0.94	17976.65
SAUDI PRINTING & PACKAGING C	14.3	8.33%	AL BAPTAIN POWER & TELECOMMU	44.55	-2.73%	ANAAM INTERNATIO	1.13	10003.91
AL-BAHA DEVELOPMENT & INVEST	0.18	5.88%	GULF UNION COOPERATIVE INSUR	16.28	-2.16%	SAUDI FISHERIES	27.90	9258.85
MOHAMMED HASAN AL NAQOOL SON	34.35	4.73%	WALAA COOPERATIVE INSURANCE	21.54	-2.00%	SAUDI ARABIAN OIL C	27.65	5719.02

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,476.93							
Change	15.47	0.35%						
Previous Close	4,461.46		Real Estate & Construction	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Open	4,461.46		Banking	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	4,483.43		Insurance	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	4,460.75		Consumer Staples	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.10		Services	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Industrial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	68,359.64		Telecommunication	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	270.16		Transportation	#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
AL SALAM BANK SUDAN	0.66	7.49%	MASHREQBANK	226	-2.59%	DRAKE & SCULL INTEI	0.39	88,754.53
DRAKE & SCULL INTERNATIONAL	0.386	4.04%	ISLAMIC ARAB INSURANCE COM	0.375	-1.83%	UNION PROPERTIES F	0.34	26,888.50
EMIRATES INTEGRATED TELECOMM	6.82	3.02%	DUBAI ISLAMIC INSURANCE CO	0.347	-1.70%	EMAAR PROPERTIES I	8.69	7,287.33
UNION PROPERTIES PJSC	0.344	2.08%	TAKAFUL EMARAT INSURANCE	0.511	-1.16%	DEYAAR DEVELOPME	0.68	6,381.44
AL FIRDOUS HOLDINGS PJSC	0.315	1.29%	DUBAI FINANCIAL MARKET PJSC	1.26	-0.79%	SHUAA CAPITAL PSC	0.19	5,124.80

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,473.98							
Change	13.15	0.14%						
Previous Close	9,460.83		Financial	16,669.83	16,679.07	-0.06%	0.43%	1.40%
Open	9,460.83		Telecommunication	4,665.68	4,660.91	0.10%	1.70%	4.23%
Day's High	9,485.00		Consumer Services	15,521.53	15,638.67	-0.75%	-0.13%	8.06%
Day's Low	9,428.58		Basic Material	4,744.89	4,640.14	2.26%	1.94%	-1.18%
YTD Change	-1.08%		Industrials	2,698.79	2,679.24	0.73%	0.06%	2.83%
			Utilities	11,402.54	11,203.89	1.77%	0.35%	13.44%
Volume Mn	336,418.98		Energy	2,136.54	2,108.39	1.34%	1.90%	4.09%
Value Traded Mn	1,300.34		Health Care	2,579.06	2,572.96	0.24%	-1.40%	-1.28%
Traded / Listed Stocks	74	84	Real Estate	11,430.36	11,476.09	-0.40%	-3.40%	6.77%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
APEX INVESTMENT CO PSC	4.42	9.68%	NATIONAL CORP TOURISM & HOTE	2.54	-2.31%	APEX INVESTMENT C	4.42	147125.88
GULF CEMENT CO	0.529	8.85%	EASY LEASE MOTOR CYCLE PRJSC	25.5	-1.92%	MULTIPLY GROUP	2.27	37749.31
ARAM GROUP	2.5	4.60%	RESPONSE PLUS HOLDING PJSC	3.56	-1.66%	ESHRAQ INVESTMEN	0.29	14379.71
GHITHA HOLDING PJSC	29.1	4.23%	ABU DHABI NATL CO FOR BUILDI	0.55	-1.61%	ADNOC DRILLING CO	4.84	13650.31
AL SEER MARINE SUPPLIES & EQ	3.74	3.03%	SHARJAH ISLAMIC BANK	2.31	-1.28%	DANA GAS	0.65	13316.73

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,542.71							
Change	51.73	0.49%	Total Return	24,042.94	23,924.95	0.49%	0.75%	3.48%
Previous Close	10490.98		Rayan Islamic	4,910.28	4,888.36	0.45%	1.01%	2.99%
Open	10490.98		All Share	3,760.36	3,739.46	0.56%	0.75%	3.71%
Day's High	10542.71		Banks & Finance	4,647.79	4,614.04	0.73%	0.77%	5.83%
Day's Low	10464.5		Industrials	4,244.84	4,225.41	0.46%	0.16%	1.01%
YTD Change	-0.02658386		Transportation	5,371.31	5,347.42	0.45%	0.41%	-1.91%
Volume Mn	294.74		Real Estate	1,631.13	1,589.62	2.61%	4.46%	6.51%
Value Traded Mn	536.5309		Insurance	2,399.49	2,407.70	-0.34%	0.60%	1.60%
Traded / Listed Stocks	20	51	Telecommunications	1,804.52	1,816.32	-0.65%	0.87%	4.43%
			Consumer Goods	7,820.31	7,818.86	0.02%	0.92%	3.03%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
EZDAN HOLDING GROUP	0.88	9.90%	QLM LIFE & MEDICAL INSURANCE	2.15	-2.27%	EZDAN HOLDING GRC	0.88	52655.56
ALIJARAH HOLDING COMPANY QPS	0.83	5.05%	AL FALEH EDUCATION HOLDING	0.85	-1.96%	MAZAYA REAL ESTAT	0.66	41400.16
MAZAYA REAL ESTATE DEVELOPME	0.66	3.61%	QATAR GENERAL INSURANCE & RE	1.26	-1.41%	SALAM INTERNATION	0.72	30617.78
QATAR & OMAN INVESTMENT CO	0.77	2.27%	MEDICARE GROUP	4.44	-1.36%	ALIJARAH HOLDING C	0.83	25064.49
QATAR ALUMINIUM MANUFACTURING	1.31	2.19%	DOHA INSURANCE CO	2.51	-1.10%	QATAR ALUMINIUM N	1.31	19990.12

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	2,018.96							
Change	-6.27	-0.31%	MSCI Bahrain	163.06	163.50	-0.27%	-0.31%	2.32%
Previous Close	2,025.23		MSCI Bahrain Domestic Islamic	64.07	64.30	-0.37%	-0.49%	3.92%
Open	2,025.23		MSCI Bahrain Net TR USD	445.27	446.55	-0.29%	-0.33%	2.31%
Day's High	2026.020							
Day's Low	2018.960							
YTD Change	2.41%							
Volume Mn	923.16							
Value Traded Mn	0.228							
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
TRAFICO GROUP BSC	0.30	3.09%	BMMI BSC	0.50	-9.91%	ITHMAAR HOLDING E	0.02	369.47
APM TERMINALS BAHRAIN BSC	1.20	3.00%	ITHMAAR HOLDING BSC	0.02	-8.70%	GFH FINANCIAL GROI	0.34	220.00
-	-	-	BAHRAIN COMMERCIAL FACILITIE	0.32	-1.56%	BAHRAIN COMMERCI	0.32	141.59
-	-	-	ALUMINIUM BAHRAIN BSC	1.27	-0.78%	ZAIN BAHRAIN BSCC	0.11	125.00
-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.49	-0.20%	ALUMINIUM BAHRAII	1.27	104.36

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,202.89							
Change	34.19	0.48%	Industrials	728.79	727.67	0.15%	-4.21%	-19.73%
Previous Close	7,168.70		Banks	1,772.19	1,763.09	0.52%	-0.37%	7.57%
Open	7,177.97		Consumer Service	998.69	999.38	-0.07%	0.69%	51.64%
			Technology	1,556.85	1,556.85	0.00%	-2.73%	169.18%
Day's High	7,215.44		Real Estate	1,388.37	1,368.51	1.45%	3.33%	14.47%
Day's Low	7,176.51		Financial Services	1,423.20	1,416.62	0.46%	1.77%	17.40%
YTD Change	5.66%		Telecom	1,030.81	1,021.03	0.96%	1.70%	-6.73%
			Health Care	472.25	450.29	4.88%	6.98%	-2.05%
Volume Mn	0.44		Insurance	2,164.24	2,255.42	-4.04%	10.33%	-5.61%
Value Traded Mn	76.83		Basic Materials	816.24	811.50	0.58%	-0.07%	9.43%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
UNITED REAL ESTATE COMPANY	88.70	20.52%	GULF INSURANCE GROUP KSC	1450.00	-8.81%	UNITED REAL ESTATE	88.70	28067.73
FIRST TAKAFUL INSURANCE CO	223.00	9.85%	METAL & RECYCLING CO	73.70	-7.64%	AL SAFAT INVESTMEI	92.20	23070.55
GULF FRANCHISING HOLDING CO	89.00	9.74%	AL SAFAT INVESTMENT CO	92.20	-4.95%	KUWAIT BUSINESS TC	94.50	19062.16
WETHAQ TAKAFUL INSURANCE CO	42.40	8.72%	ENERGY HOUSE HOLDING CO KSCP	118.00	-4.84%	MANAZEL HOLDING	41.00	16283.57
AL MAIDAN DENTAL CLINIC CO K	796.00	6.99%	AL MASAKEN INTL REAL ESTATE	32.00	-4.48%	KUWAIT REAL ESTATI	241.00	15977.78

Source: FSC