

Financial Services Company
GCC Daily Report



2025

Research Department

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FSC Daily Report

23/02/2025



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	3,843.08	(1.3)	3.6	23.2	21.2	3.6	3.0	1.70%
MSCI Emerging Markets Index	1,147.30	1.3	6.7	14.5	15.1	1.8	1.7	2.64%
MSCI FM FRONTIER MARKETS	559.47	(0.4)	5.0	11.4	12.1	0.2	1.6	4.06%

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	602.48	(0.0)	5.8	11.3	13.9	1.7	1.7	3.88%
Muscat Stock Exchange MSX 30 Index	4,454.81	0.2	(2.7)	9.5	12.4	0.6	0.8	6.16%
Tadawul All Share Index	12,388.15	0.6	2.9	20.0	22.2	2.4	2.3	3.59%
Dubai Financial Market General Index	5,359.25	(0.4)	3.9	9.4	11.3	1.5	1.1	4.52%
FTSE ADX GENERAL INDEX	9,618.34	(0.0)	2.1	17.2	21.5	2.6	2.3	2.10%
Qatar Exchange Index	10,641.09	(0.1)	0.7	11.7	14.1	1.3	1.5	4.08%
Bahrain Bourse All Share Index	1,943.43	0.2	(2.1)	15.7	11.1	1.3	0.9	3.75%
Boursa Kuwait All Share Price Return I	8,091.92	(0.6)	9.9	21.1	20.8	1.9	1.5	26.52%

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	601.99	1.4	5.7	15.9	17.0	1.8	1.7	2.58%
MSCI AC Asia Ex. Japan Index	746.90	1.8	6.1	15.5	16.8	1.7	1.7	0.00%
Nikkei 225	38,776.94	0.3	(2.8)	19.9	25.5	2.1	1.9	1.79%
S&P/ASX 200	8,296.21	(0.3)	1.7	21.3	19.2	2.4	2.2	3.67%
Hang Seng Index	23,477.92	4.0	17.0	11.7	11.0	1.3	1.1	3.57%
NSE Nifty 50 Index	22,795.90	(0.5)	(3.6)	21.3	23.9	3.4	3.3	1.41%

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	185.79	0.5	9.4	16.2	16.2	2.2	1.9	3.10%
MSCI Emerging Markets Europe Index	133.18	(0.7)	12.5	7.8	7.1	1.2	1.0	3.74%
FTSE 100 Index	8,659.37	(0.0)	6.0	14.3	13.9	2.0	1.7	3.61%
Deutsche Boerse AG German Stock In	22,287.56	(0.1)	11.9	18.6	15.4	2.0	1.6	2.54%
CAC 40	8,154.51	0.4	10.5	17.0	16.1	2.0	1.8	3.02%

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	5,961.57	(1.8)	2.3	27.6	23.8	5.1	4.2	1.30%
S&P 500 INDEX	6,013.13	(1.7)	2.2	27.1	23.7	5.2	4.3	1.26%
Dow Jones Industrial Average	43,428.02	(1.7)	2.1	23.9	21.3	5.7	4.7	1.63%
NASDAQ Composite Index	19,524.01	(2.2)	1.1	41.0	38.9	7.2	6.0	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	569.4	-1.6	3.6	-31%	149%
Gold Spot \$/Oz	2,936.1	-0.1	11.9	0%	179%
BRENT CRUDE FUTR Apr25	74.4	-2.7	0.3	-12%	61%
Generic 1st'OQA' Future	76.9	-3.0	1.1	-39%	317%
LME COPPER 3MO (\$)	9,559.0	0.0	9.0	-12%	121%
SILVER SPOT \$/OZ	32.5	-1.5	12.3	-7%	171%

Muscat Stock Exchange

	4,454.81		Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,454.81							
Change	10.94	0.25%						
Previous Close	4,443.87		Financial Sector	7,732.29	7,748.81	-0.21%	-1.17%	0.08%
Open	4,443.87		Industry Sector	5,666.33	5,624.30	0.75%	4.75%	7.51%
Day's High	4,454.81		Services Sector	1,655.06	1,638.71	1.00%	-2.20%	-5.05%
Day's Low	4,430.38							
YTD Change	-2.66%							
Volume Mn	17.37							
MSX30 Value Traded Mn	3.01							
Traded Securities	54.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN CEMENT	0.451	10.00%	ANWAR INVEST.RI	0.001	-98.48%	OMAN QATAR INSURANCE	0.217	4741.8
RENAISSANCE SERVICES	0.370	6.94%	OMAN UNITED INSURANCE	0.216	-10.00%	OQ BASE INDUSTRIES (SFZ)	0.100	2663.4
JAZEERA STEEL PRODUCTS	0.383	3.51%	CONSTRUCTION MATERIAL INDUSTRIE	0.075	-8.54%	ALBATINAH POWER	0.069	2407.9
AL ANWAR CERAMIC	0.111	2.78%	TAKAFUL OMAN	0.046	-6.12%	GALFAR ENGINEERING & CONTRAC	0.078	1174.0
SHARQIYAH DESALINATION	0.136	2.26%	AL MADINA INVESTMENT HOLDING	0.045	-4.26%	OQ EXPLORATION AND PRODUCTIC	0.311	1028.6

Saudi Exchange

	12,388.15		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,388.15							
Change	70.56	0.57%	Tadawul Banks	12,946.30	12,843.51	0.80%	0.00%	1.85%
Previous Close	12,317.59		Tadawul Energy	5,254.47	5,245.35	0.17%	0.00%	-0.32%
Open	12,317.59		Tadawul Utilities	13,612.82	13,358.86	1.90%	0.00%	-2.50%
Day's High	12,388.15		Tadawul Telecom	8,910.17	8,692.46	2.50%	0.00%	4.85%
Day's Low	12,301.62		Tadawul Insurance	10,324.72	10,426.52	-0.98%	0.00%	-4.46%
YTD Change	2.92%		Tadawul Retailing	7,977.22	7,960.81	0.21%	0.00%	-0.09%
Volume Mn	261,651.80		Tadawul Food & Beverages	6,059.64	6,063.27	-0.06%	0.00%	-2.26%
Value Traded Mn	5,787.39		Tadawul Media	27,050.20	27,526.02	-1.73%	0.00%	-14.12%
Traded / Listed Stocks	246	228	Tadawul Materials	5,501.88	5,497.80	0.07%	0.00%	-1.56%
			Tadawul Capital Goods	15,708.86	15,874.05	-1.04%	0.00%	-0.89%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
#N/A Invalid Security	'A Invalid Secu	-	NATIONAL CO FOR GLASS IN/THE	53.60	-	#N/A	#N/A	#N/A
#N/A Invalid Security	'A Invalid Secu	-	ZAMIL INDUSTRIAL INVESTMENT	36.60	-	#N/A	#N/A	#N/A
#N/A Invalid Security	'A Invalid Secu	-	MOBILE TELECOMMUNICATIONS CO	11.40	-	#N/A	#N/A	#N/A
#N/A Invalid Security	'A Invalid Secu	-	YANBU CEMENT CO	23.38	-	#N/A	#N/A	#N/A
#N/A Invalid Security	'A Invalid Secu	-	YANBU NATIONAL PETROCHEMICAL	37.40	-	#N/A	#N/A	#N/A

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,359.25							
Change	-20.96	-0.39%						
Previous Close	5,380.21		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,382.52		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	5,382.52		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,347.99		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.04		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	256,075.93		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	500.74		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
UNION PROPERTIES PJSC	0.479	9.11%	AL SALAM BANK SUDAN	0.668	-2.91%	UNION PROPERTIES PJSC	0.48	145643.09
GULF NAVIGATION HOLDING PJSC	5.29	3.93%	DUBAI ELECTRICITY & WATER AU	2.61	-2.61%	DRAKE & SCULL INTERNATIONAL	0.34	32753.30
AIR ARABIA PJSC	3.49	2.95%	SHUAA CAPITAL PSC	0.227	-2.58%	DEYAAR DEVELOPMENT PJSC	0.94	28585.61
DRAKE & SCULL INTERNATIONAL	0.343	1.78%	TAKAFUL EMARAT INSURANCE	1.34	-1.47%	SHUAA CAPITAL PSC	0.23	19074.22
AMLAK FINANCE	0.86	1.65%	AJMAN BANK PJSC	1.67	-1.18%	DUBAI ELECTRICITY & WATER AU	2.61	11621.92

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,618.34							
Change	-1.38	-0.01%						
Previous Close	9,619.72		Financial	17,162.46	17,154.44	0.05%	0.00%	-0.03%
Open	9,619.72		Telecommunication	4,076.94	4,057.30	0.48%	0.00%	-2.92%
			Consumer Services	10,200.34	10,276.82	-0.74%	0.00%	-18.47%
Day's High	9,637.70		Basic Material	4,738.29	4,759.12	-0.44%	0.00%	1.56%
Day's Low	9,618.34		Industrials	2,633.63	2,690.44	-2.11%	0.00%	-2.28%
YTD Change	2.12%		Utilities	12,316.33	12,356.06	-0.32%	0.00%	-0.64%
			Energy	2,322.63	2,326.88	-0.18%	0.00%	2.20%
Volume Mn	292,412.33		Health Care	2,292.00	2,297.79	-0.25%	0.00%	-9.99%
Value Traded Mn	1,107.88		Real Estate	13,363.63	13,182.37	1.38%	0.00%	18.55%
Traded / Listed Stocks	73	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
GULF MEDICAL PROJECTS	2.19	7.35%	UNION INSURANCE CO	0.527	-9.91%	ABU DHABI NATIONAL HOTELS	0.59	48640.21
SUDATEL TELECOM GROUP LTD	0.328	5.47%	INSURANCE HOUSE	0.85	-5.56%	MULTIPLY GROUP	1.97	15006.01
FOODCO NATIONAL FOODSTUFF CO	1.65	2.48%	ALKHALEEJ INVESTMENT	4.25	-5.13%	DANA GAS	0.80	10865.83
RAS AL KHAIMA POULTRY	1.79	2.29%	ALPHA DHABI HOLDING PJSC	11.02	-5.00%	BOROUGE	2.55	10672.73
ESHRAQ INVESTMENTS PJSC	0.335	1.82%	GULF CEMENT CO	0.53	-3.11%	ESHRAQ INVESTMENTS PJSC	0.34	9305.31

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,641.09							
Change	-13.31	-0.12%	Total Return	24,310.20	24,340.62	-0.12%	-0.12%	-0.06%
Previous Close	10654.4		Rayan Islamic	4,926.77	4,931.80	-0.10%	-0.10%	-0.40%
Open	10654.4		All Share	3,789.88	3,794.93	-0.13%	-0.13%	-0.11%
Day's High	10662.19		Banks & Finance	4,679.61	4,683.19	-0.08%	-0.08%	1.05%
Day's Low	10615.99		Industrials	4,293.39	4,292.24	0.03%	0.03%	-2.00%
YTD Change	0.00662183		Transportation	5,283.76	5,297.24	-0.25%	-0.25%	0.61%
Volume Mn	148.284		Real Estate	1,606.51	1,612.12	-0.35%	-0.35%	-1.12%
Value Traded Mn	343.6093		Insurance	2,303.62	2,331.82	-1.21%	-1.21%	-4.10%
Traded / Listed Stocks	20	51	Telecommunications	1,990.41	1,987.64	0.14%	0.14%	-1.22%
			Consumer Goods	7,825.56	7,862.94	-0.48%	-0.48%	-0.18%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
ESTITHMAR HOLDING QPSC	2.17	7.32%	EZDAN HOLDING GROUP	1.01	-2.33%	EZDAN HOLDING GROUP	1.01	24578.28
GULF INTERNATIONAL SERVICES	3.46	1.59%	AAMAL CO	0.90	-1.96%	ESTITHMAR HOLDING QPSC	2.17	21544.27
QATAR INDUSTRIAL MANUFACTUR	2.60	1.05%	QATAR INSURANCE CO	2.04	-1.88%	QATAR ALUMINIUM MANUFACTUR	1.35	14143.87
DOHA BANK QPSC	2.07	0.83%	INMA HOLDING COMPANY	3.68	-1.74%	BALADNA	1.30	7670.27
MEKDAM HOLDING GROUP	3.40	0.80%	QATAR & OMAN INVESTMENT CO	0.70	-1.55%	AL RAYAN BANK	2.40	7078.16

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,943.43							
Change	3.34	0.17%						
Previous Close	1,940.09		MSCI Bahrain	155.90	155.90	0.00%	0.00%	1.77%
Open	1,940.09		MSCI Bahrain Domestic Islamic	60.88	60.88	0.00%	0.00%	1.16%
Day's High	1943.550		MSCI Bahrain Net TR USD	425.81	425.81	0.00%	0.00%	1.80%
Day's Low	1940.090							
YTD Change	-2.14%							
Volume Mn	55,546.28							
Value Traded Mn	11.363							
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
APM TERMINALS BAHRAIN BSC	1.18	6.31%	ZAIN BAHRAIN BSCC	0.12	-3.33%	AL SALAM BANK BSC	0.21	424.96
SOLIDARITY BAHRAIN BSC	0.38	5.63%	SEEF PROPERTIES	0.12	-3.28%	ARAB INSURANCE GROUP(BSC)-\$	0.85	318.00
NATIONAL HOTELS CO	0.22	3.29%	BAHRAIN COMMERCIAL FACILITIE	0.30	-1.67%	ALUMINIUM BAHRAIN BSC	1.13	115.94
ALUMINIUM BAHRAIN BSC	1.13	0.45%	-	-	-	SEEF PROPERTIES	0.12	85.50
-	-	-	-	-	-	BAHRAIN COMMERCIAL FACILITIE	0.30	80.00

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	8,091.92							
Change	-51.02	-0.63%	Industrials	759.98	763.64	-0.48%	3.19%	5.02%
Previous Close	8,142.94		Banks	2,033.44	2,037.45	-0.20%	4.71%	12.36%
Open	8,145.92		Consumer Service	1,036.74	1,049.42	-1.21%	0.50%	3.81%
			Technology	1,542.30	1,433.17	7.61%	47.22%	48.25%
Day's High	8,164.43		Real Estate	1,551.35	1,542.84	0.55%	3.24%	14.65%
Day's Low	8,089.27		Financial Services	1,549.43	1,570.73	-1.36%	0.74%	2.57%
YTD Change	9.91%		Telecom	1,067.93	1,080.97	-1.21%	5.41%	4.93%
			Health Care	519.30	519.30	0.00%	12.01%	13.31%
Volume Mn	0.51		Insurance	2,072.94	2,088.13	-0.73%	1.53%	0.86%
Value Traded Mn	151.14		Basic Materials	922.66	930.33	-0.82%	4.69%	1.25%
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
ALI ALGHANIM SONS AUTOMOTIVE	1251.00	10.32%	OULA FUEL MARKETING CO	424.00	-41.27%	KUWAIT BUSINESS TOWN REAL ES	170.00	98579.44
AUTOMATED SYSTEMS CO KSCC	212.00	7.61%	SOOR FUEL MARKETING CO KSC	238.00	-26.54%	OULA FUEL MARKETING CO	424.00	54387.05
AL TAMDEEN INVESTMENT CO	700.00	5.90%	UNICAP INVESTMENT AND FINANC	269.00	-17.23%	ARZAN FINANCIAL GROUP FOR FI	288.00	46363.23
UNITED PROJECTS FOR AVIATION	187.00	5.65%	WARBA CAPITAL HOLDING CO	279.00	-9.42%	WARBA CAPITAL HOLDING CO	279.00	24824.66
OSOS HOLDING GROUP CO	132.00	5.60%	ENERGY HOUSE HOLDING CO KSCP	236.00	-8.88%	AAYAN LEASING & INVESTMENT	161.00	16230.52

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