

**Financial Services Company**  
GCC Daily Report



2025

**Research Department**

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# FSC Daily Report

22/01/2025



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	3,817.28	0.8	3.0	22.5	21.1	3.5	3.0	1.69%
MSCI Emerging Markets Index	1,081.11	0.1	0.5	13.8	15.2	1.7	1.7	2.73%
MSCI FM FRONTIER MARKETS	543.66	0.2	2.1	#N/A N/A	12.2	0.2	1.6	4.14%

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	578.49	0.4	1.6	10.8	14.0	1.6	1.7	4.02%
Muscat Stock Exchange MSX 30 Index	4,618.72	0.1	0.9	9.1	12.4	0.7	0.8	5.94%
Tadawul All Share Index	12,410.54	0.3	3.1	19.9	22.2	2.4	2.3	3.56%
Dubai Financial Market General Index	5,231.28	0.2	1.4	10.1	11.3	1.5	1.1	4.63%
FTSE ADX GENERAL INDEX	9,564.60	0.5	1.5	17.0	21.5	2.5	2.3	2.11%
Qatar Exchange Index	10,619.40	1.1	0.5	11.4	14.2	1.3	1.5	4.03%
Bahrain Bourse All Share Index	1,898.63	(0.3)	(4.4)	15.4	11.0	1.3	0.9	3.84%
Boursa Kuwait All Share Price Return Ir	7,691.01	0.9	4.5	19.8	20.7	1.8	1.5	3.87%

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	571.64	0.1	0.4	15.2	17.0	1.7	1.7	2.65%
MSCI AC Asia Ex. Japan Index	702.64	0.0	(0.2)	14.8	16.8	1.7	1.7	0.00%
Nikkei 225	39,646.25	1.6	(0.6)	18.1	25.5	2.1	1.9	1.72%
S&P/ASX 200	8,429.79	0.3	3.3	21.2	19.3	2.5	2.2	3.45%
Hang Seng Index	19,778.77	(1.6)	(1.4)	10.0	11.0	1.1	1.1	4.24%
NSE Nifty 50 Index	23,155.35	0.6	(2.1)	21.5	23.9	3.4	3.3	1.38%

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	176.17	0.4	3.7	15.3	16.3	2.1	1.9	3.24%
MSCI Emerging Markets Europe Index	125.67	0.1	6.2	7.3	7.1	1.1	1.0	4.07%
FTSE 100 Index	8,568.32	0.2	4.8	14.1	14.0	1.9	1.7	3.66%
Deutsche Boerse AG German Stock Inc	21,279.85	1.1	6.9	17.6	15.5	1.9	1.6	2.63%
CAC 40	7,829.80	0.8	6.1	14.8	16.1	1.9	1.8	3.14%

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	6,001.70	0.9	3.0	27.0	23.7	5.0	4.1	1.28%
S&P 500 INDEX	6,049.24	0.9	2.8	27.2	23.6	5.3	4.3	1.24%
Dow Jones Industrial Average	44,025.81	1.2	3.5	24.0	21.2	5.4	4.7	1.61%
NASDAQ Composite Index	19,756.78	0.6	2.3	41.2	38.7	7.3	5.9	0.65%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	572.99	-0.9	4.2	-30%	151%
Gold Spot \$/Oz	2,761.84	0.6	5.2	-1%	163%
BRENT CRUDE FUTR Mar25	79.72	0.5	6.8	-7%	73%
Generic 1st'OQA' Future	82.90	0.4	9.0	-34%	349%
LME COPPER 3MO (\$)	9,284.50	0.1	5.9	-15%	114%
SILVER SPOT \$/OZ	30.92	0.5	7.0	-11%	158%

Source: FSC

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### Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,618.72							
Change	6.01	0.13%						
Previous Close	4,612.71		Financial Sector	7,906.29	7,909.25	-0.04%	2.34%	2.34%
Open	4,612.04		Industry Sector	5,461.05	5,410.47	0.93%	3.61%	3.61%
Day's High	4,619.63		Services Sector	1,712.56	1,714.01	-0.08%	-1.75%	-1.75%
Day's Low	4,609.08							
YTD Change	0.92%							
Volume Mn	20.41							
MSX30 Value Traded Mn	4.08							
Traded Securities	51							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
MAJAN GLASS	0.018	28.57%	FINANCIAL CORPORATION	0.032	-8.57%	OQ EXPLORATION AN	0.341	5652.41
CONSTRUCTION MATERIAL INDUSTRIE	0.067	9.84%	LIVA CONV.BONDS 24	0.065	-7.14%	OQ BASE INDUSTRIES	0.113	3685.60
AL ANWAR CERAMIC	0.108	9.09%	NATIONAL DETERGENT	0.740	-5.13%	GALFAR ENGINEERIN	0.080	3133.38
MAJAN COLLEGE	0.121	8.04%	MUSANDAM POWER	0.266	-4.32%	CONSTRUCTION MAT	0.067	1236.89
SMN POWER HOLDING	0.340	3.03%	UNITED FINANCE	0.059	-3.28%	OQ GAS NETWORKS	0.136	971.44

### Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,410.54		Tadawul Banks	12,714.41	12,629.84	0.67%	1.34%	3.68%
Change	40.91	0.33%	Tadawul Energy	5,319.90	5,301.46	0.35%	-0.45%	0.38%
Previous Close	12,369.63		Tadawul Utilities	14,248.95	14,262.83	-0.10%	4.12%	3.42%
Open	12,376.38		Tadawul Telecom	8,373.98	8,327.60	0.56%	1.72%	6.44%
Day's High	12,434.54		Tadawul Insurance	11,299.22	11,272.41	0.24%	4.31%	6.37%
Day's Low	12,364.91		Tadawul Retailing	7,903.21	7,900.64	0.03%	0.44%	5.06%
YTD Change	3.11%		Tadawul Food & Beverages	5,931.83	5,959.97	-0.47%	-3.13%	-1.35%
Volume Mn	287,231.02		Tadawul Media	31,889.94	31,843.46	0.15%	0.78%	-0.10%
Value Traded Mn	6,673.07		Tadawul Materials	5,629.89	5,618.82	0.20%	1.55%	1.11%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	16,103.02	16,042.53	0.38%	2.70%	6.15%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
NASEEL INTERNATIONAL TRADING	106.2	7.93%	AL HASOOB CO	66.00	-4.35%	AL-BAHA DEVELOPMI	0.43	58439.59
AL JOUF MINERAL WATER BOTTLI	44.2	5.24%	ELM CO	1185.60	-3.26%	TOURISM ENTERPRIS	0.94	10566.88
MIDDLE EAST HEALTHCARE CO	79.1	4.35%	SAUDI STEEL PIPE CO	69.30	-2.12%	SAUDI CHEMICAL CO	10.02	7227.64
EAST PIPES INTEGRATED CO FOR	162	3.71%	UNITED INTERNATIONAL TRANSPO	83.00	-1.89%	ANAAM INTERNATIO	1.27	5790.57
NATIONAL MEDICAL CARE CO	160.4	3.35%	WATANI IRON STEEL CO	2.80	-1.75%	FITAIHI HOLDING GRI	4.65	5351.31

## Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,231.28							
Change	11.02	0.21%						
Previous Close	5,220.26		Real Estate & Construction	N/A	N/A	N/A	N/A	N/A
Open	5,220.26		Banking	N/A	N/A	N/A	N/A	N/A
			Investment and Financial	N/A	N/A	N/A	N/A	N/A
Day's High	5,246.26		Insurance	N/A	N/A	N/A	N/A	N/A
Day's Low	5,213.85		Consumer Staples	N/A	N/A	N/A	N/A	N/A
YTD Change	0.01		Services	N/A	N/A	N/A	N/A	N/A
			Industrial	N/A	N/A	N/A	N/A	N/A
Volume Mn	117,091.02		Telecommunication	N/A	N/A	N/A	N/A	N/A
Value Traded Mn	706.41		Transportation	N/A	N/A	N/A	N/A	N/A
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	0.71	12.34%	DUBAI REFRESHMENTS COMPANY	22.35	-9.88%	UNION PROPERTIES F	0.43	45,151.19
AMLAK FINANCE	0.852	1.79%	DUBAI INSURANCE CO. (P.S.C.)	12.8	-5.19%	DRAKE & SCULL INTEI	0.35	12,202.34
UNION PROPERTIES PJSC	0.43	1.65%	GULF NAVIGATION HOLDING PJSC	5.29	-2.04%	EMAAR PROPERTIES I	13.25	11,594.54
ARAMEX PJSC	2.81	1.44%	AL FIRDOUS HOLDINGS PJSC	0.313	-1.88%	DEYAAR DEVELOPME	0.93	11,271.09
EMAAR DEVELOPMENT PJSC	14.25	1.42%	BHM CAPITAL FINANCIAL SERVIC	2.14	-1.83%	DUBAI FINANCIAL M/	1.60	10,596.47

## Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,564.60							
Change	47.50	0.50%						
Previous Close	9,517.10		Financial	16,991.38	16,959.72	0.19%	0.28%	1.28%
Open	9,517.10		Telecommunication	4,185.01	4,091.68	2.28%	4.16%	4.41%
Day's High	9,591.92		Consumer Services	12,896.84	12,941.27	-0.34%	-2.10%	-1.13%
Day's Low	9,517.10		Basic Material	4,734.48	4,729.27	0.11%	0.11%	3.96%
YTD Change	1.55%		Industrials	2,811.75	2,806.77	0.18%	0.90%	3.43%
			Utilities	12,395.79	12,435.52	-0.32%	-0.32%	-11.11%
Volume Mn	243,724.05		Energy	2,291.90	2,273.05	0.83%	1.10%	1.57%
Value Traded Mn	1,048.72		Health Care	2,630.61	2,605.18	0.98%	-0.09%	9.24%
Traded / Listed Stocks	73	84	Real Estate	11,299.21	10,996.74	2.75%	1.40%	0.46%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
ABU DHABI NATIONAL TAKAFUL C	4.63	14.89%	ESG EMIRATES STALLIONS GROU	10.2	-2.86%	ESHRAQ INVESTMEN	0.36	26052.54
FUJAIRAH CEMENT INDUSTRIES	0.303	14.77%	NATIONAL BANK OF RAS AL-KHAI	6.09	-1.62%	MULTIPLY GROUP	2.12	19291.87
HILY HOLDING PJSC	2.96	14.73%	BANK OF SHARJAH	0.928	-1.17%	RAK PROPERTIES	1.18	16216.51
GULF MEDICAL PROJECTS	2.2	10.00%	GHITHA HOLDING PJSC	24.32	-1.06%	APEX INVESTMENT C	4.87	12437.02
FINANCE HOUSE	2.18	9.00%	MULTIPLY GROUP	2.12	-0.93%	MANAZEL REAL ESTA	0.33	10254.20

### Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,619.40							
Change	112.12	1.07%		24,217.80	23,962.12	1.07%	1.41%	0.46%
Previous Close	10507.28		<b>Total Return</b>	4,918.82	4,866.23	1.08%	2.05%	0.99%
Open	10507.28		<b>Rayan Islamic</b>	3,774.20	3,740.75	0.89%	1.08%	-0.03%
			<b>All Share</b>	4,597.18	4,562.19	0.77%	-0.45%	-2.93%
Day's High	10640.15		<b>Banks &amp; Finance</b>	4,338.34	4,299.15	0.91%	2.49%	2.16%
Day's Low	10498.86		<b>Industrials</b>	5,419.27	5,382.21	0.69%	2.60%	4.93%
YTD Change	0.004570063		<b>Transportation</b>	1,611.42	1,600.46	0.68%	3.56%	-0.31%
			<b>Real Estate</b>	2,363.88	2,349.28	0.62%	2.00%	0.65%
Volume Mn	234.501		<b>Insurance</b>	1,984.49	1,935.49	2.53%	4.59%	10.33%
Value Traded Mn	690.1314		<b>Telecommunications</b>	7,804.25	7,728.00	0.99%	1.93%	1.79%
Traded / Listed Stocks	20	51	<b>Consumer Goods</b>					

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
COMMERCIAL BANK PSQC	4.48	3.85%	QATAR CINEMA & FILM DISTRIB	2.40	-5.88%	QATAR ALUMINUM M	1.32	50448.32
QATAR ALUMINUM MANUFACTURING	1.32	3.29%	GULF WAREHOUSING COMPANY	3.16	-1.71%	AL RAYAN BANK	2.50	16569.41
OOREDOO QPSC	12.90	3.12%	EZDAN HOLDING GROUP	1.02	-1.06%	COMMERCIAL BANK I	4.48	16135.82
MESAIEED PETROCHEMICAL HOLDI	1.50	2.59%	QATAR GERMAN CO FOR MEDICAL	1.40	-0.64%	MESAIEED PETROCHE	1.50	15862.20
DOHA BANK QPSC	2.05	2.50%	QATAR ELECTRICITY & WATER CO	15.80	-0.63%	EZDAN HOLDING GRC	1.02	15434.67

### Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,898.63							
Change	-5.44	-0.29%						
Previous Close	1,904.07		<b>MSCI Bahrain</b>	153.35	153.73	-0.24%	0.10%	-3.38%
Open	1,904.07		<b>MSCI Bahrain Domestic Islamic</b>	60.16	60.19	-0.05%	0.38%	-3.99%
Day's High	1904.070		<b>MSCI Bahrain Net TR USD</b>	418.76	419.78	-0.24%	0.10%	-3.33%
Day's Low	1898.200							
YTD Change	-4.39%							
Volume Mn	397.18							
Value Traded Mn	0.124							
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
-	-	-	GFH FINANCIAL GROUP BSC	0.31	-1.27%	AL SALAM BANK BSC	0.20	420.14
-	-	-	ALUMINIUM BAHRAIN BSC	1.13	-0.88%	GFH FINANCIAL GROI	0.31	173.85
-	-	-	AL SALAM BANK BSC	0.20	-0.51%	BAHRAIN COMMERC	0.28	50.00
-	-	-	-	-	-	ALUMINIUM BAHRAI	1.13	41.65
-	-	-	-	-	-	ZAIN BAHRAIN BSCC	0.11	30.00

## Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,691.01							
Change	68.42	0.90%	<b>Industrials</b>	725.23	720.97	0.59%	0.22%	0.22%
Previous Close	7,622.59		<b>Banks</b>	1,915.34	1,893.10	1.17%	5.83%	5.83%
Open	7,625.66		<b>Consumer Service</b>	1,049.76	1,024.76	2.44%	5.11%	5.11%
			<b>Technology</b>	1,062.15	1,120.35	-5.19%	2.10%	2.10%
Day's High	7,692.32		<b>Real Estate</b>	1,451.62	1,449.90	0.12%	7.28%	7.28%
Day's Low	7,625.62		<b>Financial Services</b>	1,523.10	1,514.01	0.60%	0.83%	0.83%
YTD Change	4.46%		<b>Telecom</b>	1,018.64	1,015.26	0.33%	0.09%	0.09%
			<b>Health Care</b>	469.75	469.75	0.00%	2.50%	2.50%
Volume Mn	0.39		<b>Insurance</b>	2,054.51	2,045.45	0.44%	-0.04%	-0.04%
Value Traded Mn	104.15		<b>Basic Materials</b>	896.86	901.92	-0.56%	-1.58%	-1.58%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
NATIONAL PETROLEUM SERVICES	1083.00	15.21%	UNITED REAL ESTATE COMPANY	133.00	-6.99%	KUWAIT REAL ESTATI	302.00	39620.39
UMM AL QAIWAIN GENERAL INVES	92.10	7.72%	NATIONAL INTERNATIONAL CO	246.00	-5.38%	INTL FINANCIAL ADVI	456.00	24330.17
ALARGAN INTERNATIONAL REAL	118.00	5.36%	AUTOMATED SYSTEMS CO KSCC	146.00	-5.19%	KUWAIT FINANCE HC	778.00	17315.96
COMMERCIAL BANK OF KUWAIT	745.00	4.93%	ARKAN AL KUWAIT REAL ESTATE	108.00	-3.57%	GULF BANK	300.00	16131.53
OSOS HOLDING GROUP CO	134.00	4.69%	KUWAIT REAL ESTATE HOLDING C	35.70	-3.51%	KUWAIT BUSINESS TC	113.00	15885.14

Source: FSC