

Financial Services Company
GCC Daily Report



2025

Research Department

PO Box 2777, PC 112, Sultanate of Oman
Tel: +968 24825620 Fax: +968 24817205
Website: www.fscoman.net

FSC Daily Report

26/01/2025



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	3,856.78	0.0	4.0	22.9	21.1	3.6	3.0	1.68%
MSCI Emerging Markets Index	1,090.02	0.8	1.4	13.8	15.2	1.7	1.7	2.73%
MSCI FM FRONTIER MARKETS	550.04	0.5	3.3	#N/A/N/A	12.1	0.2	1.6	4.11%

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	586.05	(0.0)	2.9	10.9	14.0	1.7	1.7	3.97%
Muscat Stock Exchange MSX 30 Index	4,557.97	(1.0)	(0.4)	9.1	12.4	0.7	0.8	6.02%
Tadawul All Share Index	12,410.65	0.5	3.1	19.9	22.2	2.4	2.3	3.56%
Dubai Financial Market General Index	5,225.54	(0.4)	1.3	10.1	11.3	1.5	1.1	4.63%
FTSE ADX GENERAL INDEX	9,563.94	0.2	1.5	17.1	21.5	2.6	2.3	2.11%
Qatar Exchange Index	10,657.50	(0.0)	0.8	11.6	14.2	1.3	1.5	4.01%
Bahrain Bourse All Share Index	1,900.20	0.2	(4.3)	15.3	11.0	1.3	0.9	3.84%
Boursa Kuwait All Share Price Return I	7,776.97	1.3	5.6	19.9	20.7	1.8	1.5	3.83%

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	575.59	0.9	1.1	15.2	17.0	1.7	1.7	2.65%
MSCI AC Asia Ex. Japan Index	707.04	0.8	0.4	14.8	16.8	1.7	1.7	0.00%
Nikkei 225	39,931.98	(0.1)	0.1	18.6	25.5	2.2	1.9	1.70%
S&P/ASX 200	8,408.87	0.4	3.1	21.2	19.3	2.5	2.2	3.45%
Hang Seng Index	20,066.19	1.9	0.0	10.0	11.0	1.1	1.1	4.18%
NSE Nifty 50 Index	23,092.20	(0.5)	(2.3)	21.6	23.9	3.5	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	177.57	(0.0)	4.5	15.5	16.3	2.1	1.9	3.21%
MSCI Emerging Markets Europe Index	128.60	1.5	8.6	7.4	7.1	1.1	1.0	3.88%
FTSE 100 Index	8,502.35	(0.7)	4.0	14.1	14.0	1.9	1.7	3.69%
Deutsche Boerse AG German Stock In	21,394.93	(0.1)	7.5	17.9	15.4	1.9	1.6	2.62%
CAC 40	7,927.62	0.4	7.4	15.1	16.1	2.0	1.8	3.10%

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	6,053.23	(0.3)	3.9	27.5	23.7	5.1	4.1	1.27%
S&P 500 INDEX	6,101.24	(0.3)	3.7	27.5	23.6	5.3	4.3	1.23%
Dow Jones Industrial Average	44,424.25	(0.3)	4.4	24.2	21.2	5.4	4.7	1.59%
NASDAQ Composite Index	19,954.30	(0.5)	3.3	41.6	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	571.1	0.2	3.9	-31%	150%
Gold Spot \$/Oz	2,770.6	0.6	5.6	-1%	164%
BRENT CRUDE FUTR Mar25	78.5	0.3	5.2	-8%	70%
Generic 1st'OQA' Future	82.0	0.6	7.8	-35%	344%
LME COPPER 3MO (\$)	9,276.0	0.5	5.8	-15%	114%
SILVER SPOT \$/OZ	30.6	0.4	5.8	-12%	155%

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,557.97							
Change	-45.88	-1.00%						
Previous Close	4,603.84		Financial Sector	7,843.47	7,903.53	-0.76%	1.52%	1.52%
Open	4,603.61		Industry Sector	5,365.01	5,408.61	-0.81%	1.79%	1.79%
Day's High	4,603.61		Services Sector	1,695.58	1,708.84	-0.78%	-2.72%	-2.72%
Day's Low	4,557.97							
YTD Change	-0.41%							
Volume Mn	8.68							
MSX30 Value Traded Mn	1.49							
Traded Securities	55.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
AL SUWADI POWER	0.068	3.03%	OMAN FISHERIES	0.032	-15.79%	SOHAR INTERNATIONAL BANK	0.140	1799.9
ALBATINAH POWER	0.067	1.52%	AHLI Bank Bonds24	0.094	-14.55%	OQ GAS NETWORKS	0.132	1203.8
MUSCAT CITY DESALINATION	0.068	1.49%	AMAN REAL ESTATE	0.084	-8.70%	OQ EXPLORATION AND PRODUCTIC	0.331	1004.0
RENAISSANCE SERVICES	0.364	0.83%	BARKA DESALINATION	0.120	-6.25%	OQ BASE INDUSTRIES (SFZ)	0.111	777.2
VOLTAMP ENERGY	0.482	0.42%	TAAGEER FINANCE	0.107	-6.14%	AL SUWADI POWER	0.068	543.7

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,410.65							
Change	56.61	0.46%	Tadawul Banks	12,610.24	12,549.43	0.48%	0.48%	2.83%
Previous Close	12,354.04		Tadawul Energy	5,304.33	5,321.38	-0.32%	-0.32%	0.09%
Open	12,366.74		Tadawul Utilities	14,534.42	14,295.25	1.67%	1.67%	5.49%
Day's High	12,427.35		Tadawul Telecom	8,346.57	8,334.42	0.15%	0.15%	6.09%
Day's Low	12,355.28		Tadawul Insurance	11,280.01	11,175.73	0.93%	0.93%	6.19%
YTD Change	3.11%		Tadawul Retailing	8,002.35	7,959.85	0.53%	0.53%	6.37%
Volume Mn	240,355.28		Tadawul Food & Beverages	5,942.33	5,929.10	0.22%	0.22%	-1.17%
Value Traded Mn	5,921.38		Tadawul Media	32,223.44	32,115.68	0.34%	0.34%	0.95%
Traded / Listed Stocks	246	228	Tadawul Materials	5,658.47	5,640.50	0.32%	0.32%	1.63%
			Tadawul Capital Goods	16,078.52	15,962.08	0.73%	0.73%	5.98%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
SAUDI PARTS CENTER CO	65.00	8.33%	AME COMPANY FOR MEDICAL SUPP	114.00	-3.23%	AL-BAHA DEVELOPMENT & INVEST	0.47	421187.7
WALAA COOPERATIVE INSURANCE	24.56	7.72%	AL JOUF CEMENT	12.56	-2.64%	TOURISM ENTERPRISE CO/ SHAMS	0.95	11617.5
AL-BAHA DEVELOPMENT & INVEST	0.47	6.98%	GROUP FIVE PIPE SAUDI LTD	40.00	-1.96%	ANAAM INTERNATIONAL HOLDING	1.27	9693.3
KINGDOM HOLDING CO	9.82	5.71%	AL JOUF MINERAL WATER BOTTLI	41.80	-1.65%	FITAIHI HOLDING GROUP	4.75	4829.6
AL SAGR CO-OPERATIVE INSURAN	19.02	5.08%	ARABIAN PIPES CO	13.38	-1.62%	SADR LOGISTICS CO	3.43	3558.7

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,225.54							
Change	-23.02	-0.44%						
Previous Close	5,248.56		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,247.79		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	5,268.03		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,222.69		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.01		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	136,921.67		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	427.02		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
DUBAI REFRESHMENTS COMPANY	25	11.86%	TAKAFUL EMARAT INSURANCE	1.52	-1.94%	DEYAAR DEVELOPMENT PJSC	0.96	34936.26
AL SALAM BANK SUDAN	0.74	10.45%	EMAAR PROPERTIES PJSC	13.3	-1.48%	UNION PROPERTIES PJSC	0.43	18782.65
DEYAAR DEVELOPMENT PJSC	0.955	3.24%	AIR ARABIA PJSC	3.09	-1.28%	SHUAA CAPITAL PSC	0.26	16079.44
SHUAA CAPITAL PSC	0.26	1.56%	DUBAI ELECTRICITY & WATER AU	2.58	-1.15%	EMAAR PROPERTIES PJSC	13.30	10927.07
AL RAMZ CORPORATION INVESTME	1.32	1.54%	AJMAN BANK PJSC	1.72	-1.15%	DRAKE & SCULL INTERNATIONAL	0.35	10400.34

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,563.94							
Change	21.07	0.22%						
Previous Close	9,542.87		Financial	17,003.32	16,967.71	0.21%	0.00%	1.35%
Open	9,542.87		Telecommunication	4,199.74	4,160.45	0.94%	0.00%	4.78%
			Consumer Services	12,886.08	12,758.19	1.00%	0.00%	-1.21%
Day's High	9,577.42		Basic Material	4,705.19	4,701.95	0.07%	0.00%	3.31%
Day's Low	9,535.29		Industrials	2,771.26	2,782.32	-0.40%	0.00%	1.94%
YTD Change	1.54%		Utilities	12,435.52	12,435.52	0.00%	0.00%	-10.83%
			Energy	2,297.93	2,289.34	0.38%	0.00%	1.83%
Volume Mn	185,591.50		Health Care	2,600.03	2,600.63	-0.02%	0.00%	7.97%
Value Traded Mn	788.29		Real Estate	11,394.61	11,367.29	0.24%	0.00%	1.31%
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
ABU DHABI NATIONAL TAKAFUL C	5.25	13.39%	FOODCO NATIONAL FOODSTUFF CO	2.05	-3.76%	ESHRAQ INVESTMENTS PJSC	0.38	29381.46
COMMERCIAL BANK INTERNATIONA	0.75	7.14%	GULF CEMENT CO	0.552	-2.30%	MULTIPLY GROUP	2.19	21015.64
NATIONAL BANK OF RAS AL-KHAI	6.52	7.06%	PALMS SPORTS P.J.S.C	9.75	-2.21%	MANAZEL REAL ESTATE PJSC	0.34	20062.77
FUJAIRAH CEMENT INDUSTRIES	0.335	5.35%	ABU DHABI NATL CO FOR BUILDI	1.16	-1.69%	ADNOC DRILLING CO PJSC	5.57	10406.34
RESPONSE PLUS HOLDING PJSC	4.46	3.24%	GHITHA HOLDING PJSC	23.68	-1.33%	DANA GAS	0.76	9635.03

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,657.50							
Change	-2.62	-0.02%	Total Return	24,304.69	24,310.67	-0.02%	-0.02%	0.82%
Previous Close	10660.12		Rayan Islamic	4,922.17	4,945.10	-0.46%	-0.46%	1.06%
Open	10660.12		All Share	3,792.72	3,791.14	0.04%	0.04%	0.46%
Day's High	10714.82		Banks & Finance	4,628.41	4,616.94	0.25%	0.25%	-2.27%
Day's Low	10645.47		Industrials	4,359.24	4,353.40	0.13%	0.13%	2.66%
YTD Change	0.0081742		Transportation	5,412.66	5,408.37	0.08%	0.08%	4.80%
Volume Mn	138.08		Real Estate	1,624.04	1,626.62	-0.16%	-0.16%	0.47%
Value Traded Mn	308.8141		Insurance	2,395.79	2,397.23	-0.06%	-0.06%	2.01%
Traded / Listed Stocks	20	51	Telecommunications	1,978.86	2,010.01	-1.55%	-1.55%	10.02%
			Consumer Goods	7,797.82	7,826.39	-0.37%	-0.37%	1.71%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
QATARI INVESTORS GROUP	1.64	1.93%	AL RAYAN BANK	2.43	-2.77%	EZDAN HOLDING GROUP	1.02	24603.39
AL RAYAN QATAR ETF	2.28	1.69%	OOREDOO QPSC	12.75	-1.85%	AL RAYAN BANK	2.43	14482.88
QATAR CINEMA & FILM DISTRIB	2.43	1.13%	ALIJARAH HOLDING COMPANY QPS	0.78	-1.76%	BALADNA	1.35	12807.23
QATAR ISLAMIC INSURANCE GROU	8.84	1.04%	MESAIEED PETROCHEMICAL HOLDI	1.52	-1.55%	QATAR ALUMINIUM MANUFACTUR	1.33	12102.69
QATAR NATIONAL BANK	16.77	1.02%	QATAR NATIONAL CEMENT CO	4.10	-1.46%	MAZAYA REAL ESTATE DEVELOPME	0.59	8285.06

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,900.20							
Change	3.77	0.20%						
Previous Close	1,896.43		MSCI Bahrain	152.46	152.46	0.00%	0.00%	-3.94%
Open	1,896.43		MSCI Bahrain Domestic Islamic	59.66	59.66	0.00%	0.00%	-4.78%
Day's High	1900.200		MSCI Bahrain Net TR USD	416.33	416.37	-0.01%	0.00%	-3.89%
Day's Low	1896.430							
YTD Change	-4.32%							
Volume Mn	503.44							
Value Traded Mn	0.201							
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
ZAIN BAHRAIN BSCC	0.12	4.55%	APM TERMINALS BAHRAIN BSC	1.12	-1.41%	AL SALAM BANK BSC	0.20	106.84
AL SALAM BANK BSC	0.20	1.02%	-	-	-	GFH FINANCIAL GROUP BSC	0.32	60.00
GFH FINANCIAL GROUP BSC	0.32	0.32%	-	-	-	ALUMINIUM BAHRAIN BSC	1.12	24.38
-	-	-	-	-	-	BBK BSC	0.48	20.21
-	-	-	-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.48	10.00

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,776.97							
Change	100.94	1.32%	Industrials	722.52	716.63	0.82%	-0.15%	-0.15%
Previous Close	7,676.03		Banks	1,951.08	1,917.37	1.76%	7.81%	7.81%
Open	7,696.51		Consumer Service	1,022.69	1,011.38	1.12%	2.40%	2.40%
			Technology	1,025.77	1,040.32	-1.40%	-1.40%	-1.40%
Day's High	7,777.90		Real Estate	1,479.07	1,461.10	1.23%	9.31%	9.31%
Day's Low	7,695.53		Financial Services	1,534.29	1,524.67	0.63%	1.57%	1.57%
YTD Change	5.63%		Telecom	1,002.79	1,004.74	-0.19%	-1.47%	-1.47%
			Health Care	463.60	463.60	0.00%	1.16%	1.16%
Volume Mn	0.38		Insurance	2,035.30	1,976.72	2.96%	-0.97%	-0.97%
Value Traded Mn	97.21		Basic Materials	875.13	886.80	-1.32%	-3.96%	-3.96%
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
GULF INSURANCE GROUP KSC	1160.00	9.74%	ALARGAN INTERNATIONAL REAL	104.00	-14.05%	KUWAIT REAL ESTATE CO KSC	324.00	44602.27
COMMERCIAL FACILITIES CO	272.00	6.67%	ALKOUT INDUSTRIAL PROJECTS C	996.00	-4.96%	ALARGAN INTERNATIONAL REAL	104.00	29251.85
NATIONAL INTERNATIONAL CO	260.00	5.26%	AL MADAR KUWAIT HOLDING CO	120.00	-4.76%	ARZAN FINANCIAL GROUP FOR FI	280.00	21900.33
COMMERCIAL REAL ESTATE CO	180.00	4.05%	AJIAL REAL ESTATE ENTMT	285.00	-4.68%	KUWAIT BUSINESS TOWN REAL ES	115.00	20748.25
KUWAIT REAL ESTATE CO KSC	324.00	3.85%	AL MASAKEN INTL REAL ESTATE	40.90	-4.44%	AGILITY	246.00	13907.02

Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24825600 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net
Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24817205 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net

Disclaimer

This report prepared by Financial Services Co. SAOG (FSC), and provided for information purposes only. Under no circumstances is to be used or considered as an offer to sell or solicitation of any offer to buy. While all reasonable care has been taken to ensure that the information contained therein is not untrue or misleading at the time of publication, we make no representation as to its accuracy or completeness and it should not be relied upon as such, and the FSC accepts no responsibility whatsoever for any direct or indirect consequential loss arising from any use of this report or its contents. All opinions and estimates included in this document constitute FSC judgment as of the date of production of this report, and are subject to change without notice. This report may not be reproduced, distributed or published by any recipient for any purpose.