

Financial Services Company
GCC Daily Report



2025

Research Department

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FSC Daily Report

29/01/2025



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	3,836.25	0.6	3.5	22.6	21.1	3.6	3.0	1.68%
MSCI Emerging Markets Index	1,089.13	0.1	1.3	13.9	15.1	1.7	1.7	2.73%
MSCI FM FRONTIER MARKETS	547.53	(0.1)	2.8	-	12.1	0.2	1.6	4.12%

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	587.94	(0.2)	3.2	11.0	14.0	1.7	1.7	3.95%
Muscat Stock Exchange MSX 30 Index	4,546.76	(0.4)	(0.7)	9.4	12.4	0.7	0.8	6.03%
Tadawul All Share Index	12,411.49	(0.1)	3.1	20.0	22.2	2.4	2.3	3.56%
Dubai Financial Market General Index	5,125.84	(1.0)	(0.6)	10.0	11.3	1.5	1.1	4.72%
FTSE ADX GENERAL INDEX	9,561.44	0.1	1.5	17.1	21.5	2.5	2.3	2.11%
Qatar Exchange Index	10,682.99	0.1	1.1	11.6	14.2	1.3	1.5	4.00%
Bahrain Bourse All Share Index	1,873.73	(1.0)	(5.6)	15.3	11.1	1.3	0.9	3.89%
Boursa Kuwait All Share Price Return Ir	7,784.67	(0.2)	5.7	20.2	20.7	1.8	1.5	3.82%

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	574.04	(0.0)	0.8	15.3	17.0	1.7	1.7	2.65%
MSCI AC Asia Ex. Japan Index	706.49	0.1	0.3	14.9	16.8	1.7	1.7	0.00%
Nikkei 225	39,414.78	1.0	(1.2)	18.2	25.5	2.1	1.9	1.73%
S&P/ASX 200	8,447.01	0.6	3.5	21.1	19.3	2.5	2.2	3.44%
Hang Seng Index	20,225.11	0.1	0.8	10.1	11.0	1.1	1.1	4.15%
NSE Nifty 50 Index	23,173.40	0.9	(2.0)	21.5	23.9	3.4	3.3	1.39%

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	178.13	0.4	4.9	15.5	16.2	2.1	1.9	3.21%
MSCI Emerging Markets Europe Index	128.45	0.5	8.5	7.4	7.1	1.2	1.0	3.86%
FTSE 100 Index	8,543.42	0.1	4.5	14.1	14.0	1.9	1.7	3.67%
Deutsche Boerse AG German Stock Inc	21,552.44	0.6	8.3	17.9	15.4	1.9	1.6	2.60%
CAC 40	7,870.28	(0.3)	6.6	15.1	16.1	2.0	1.8	3.12%

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	6,020.35	0.9	3.3	27.1	23.7	5.0	4.1	1.28%
S&P 500 INDEX	6,067.70	0.9	3.2	27.3	23.6	5.3	4.3	1.24%
Dow Jones Industrial Average	44,850.35	0.3	5.4	24.5	21.2	5.5	4.7	1.58%
NASDAQ Composite Index	19,733.59	2.0	2.2	41.1	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	564.34	0.3	2.7	-31%	147%
Gold Spot \$/Oz	2,761.96	-0.1	5.2	-1%	163%
BRENT CRUDE FUTR Mar25	76.81	-0.9	2.9	-10%	66%
Generic 1st'OQA' Future	80.65	0.1	6.0	-36%	337%
LME COPPER 3MO (\$)	8,987.00	-1.2	2.5	-17%	108%
SILVER SPOT \$/OZ	30.44	0.1	5.3	-13%	154%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,546.76							
Change	-19.13	-0.42%						
Previous Close	4,565.88		Financial Sector	7,828.60	7,874.77	-0.59%	1.33%	1.33%
Open	4,565.88		Industry Sector	5,407.50	5,380.13	0.51%	2.60%	2.60%
Day's High	4,568.83		Services Sector	1,694.74	1,688.76	0.35%	-2.77%	-2.77%
Day's Low	4,542.06							
YTD Change	-0.65%							
Volume Mn	15.46							
MSX30 Value Traded Mn	2.99							
Traded Securities	52							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
FINANCIAL CORPORATION	0.041	7.89%	AL MADINA INVESTMENT HOLDING	0.046	-8.00%	BANK MUSCAT	0.256	4070.99
SMN POWER HOLDING	0.345	4.55%	OMAN EMIRATES HO.	0.061	-6.15%	OQ BASE INDUSTRIES	0.111	3033.53
CONSTRUCTION MATERIAL INDUSTRIE	0.068	3.03%	OMAN CHROMITE	3.000	-4.76%	OQ GAS NETWORKS	0.132	1673.65
OMAN FLOUR MILLS	0.440	2.33%	BANK DHOFAR	0.151	-3.21%	SOHAR INTERNATION	0.139	1472.60
MUSCAT GASES	0.100	2.04%	OMAN FISHERIES	0.032	-3.03%	OQ EXPLORATION AN	0.321	1412.47

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	12,411.49		Tadawul Banks	12,693.37	12,568.45	0.99%	1.15%	3.51%
Change	-9.15	-0.07%	Tadawul Energy	5,252.53	5,280.06	-0.52%	-1.29%	-0.89%
Previous Close	12,420.64		Tadawul Utilities	14,044.68	14,146.53	-0.72%	-1.75%	1.94%
Open	12,479.81		Tadawul Telecom	8,519.01	8,488.44	0.36%	2.21%	8.28%
Day's High	12,536.28		Tadawul Insurance	10,918.56	11,194.20	-2.46%	-2.30%	2.79%
Day's Low	12,384.40		Tadawul Retailing	8,044.93	8,088.91	-0.54%	1.07%	6.94%
YTD Change	3.12%		Tadawul Food & Beverages	6,186.38	6,196.57	-0.16%	4.34%	2.89%
Volume Mn	342,504.85		Tadawul Media	31,517.71	31,394.04	0.39%	-1.86%	-1.26%
Value Traded Mn	8,650.21		Tadawul Materials	5,596.85	5,606.09	-0.16%	-0.77%	0.52%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	15,759.42	15,844.72	-0.54%	-1.27%	3.88%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SAUDI CABLE CO	131.6	4.44%	RAOOM TRADING CO	179.20	-7.15%	AL-BAHA DEVELOPMI	0.45	21158.56
AL RAJHI BANK	98.9	3.13%	BUPA ARABIA FOR COOPERATIVE	195.60	-6.32%	SAUDI ARABIAN OIL (27.70	13803.77
GULF GENERAL COOPERATIVE INS	11.46	2.69%	NATIONAL BUILDING AND MARKET	173.00	-4.95%	AL RAJHI BANK	98.90	7664.57
RABIGH REFINING AND PETROCHE	8.32	2.34%	MAKKAH CONSTRUCTION & DEVEPL	106.40	-3.80%	THE SAUDI NATIONAL	34.25	7315.78
AL-BAHA DEVELOPMENT & INVEST	0.45	2.27%	ASH-SHARQIYAH DEVELOPMENT CO	21.20	-3.64%	TOURISM ENTERPRIS	0.93	6051.94

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,125.84							
Change	-50.89	-0.98%						
Previous Close	5,176.73		Real Estate & Construction	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Open	5,177.50		Banking	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Day's High	5,184.65		Insurance	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,116.60		Consumer Staples	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
YTD Change	-0.01		Services	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
			Industrial	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Volume Mn	203,466.97		Telecommunication	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	506.92		Transportation	#VALUE!	#VALUE!	#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
EMIRATES ISLAMIC BANK	9.51	14.86%	EMIRATES NBD PJSC	20.7	-8.41%	SHUAA CAPITAL PSC	0.26	23,338.52
EMAAR PROPERTIES PJSC	13.25	1.53%	NATIONAL GENERAL INSURANCE	4.5	-7.98%	EMAAR PROPERTIES I	13.25	13,689.00
TAKAFUL EMARAT INSURANCE	1.48	1.37%	EMIRATES INVESTMENT BANK	96	-3.03%	UNION PROPERTIES F	0.43	11,352.45
AL FIRDOUS HOLDINGS PJSC	0.315	1.29%	AL SALAM BANK SUDAN	0.817	-2.74%	ARAMEX PJSC	2.80	8,403.50
DUBAI ISLAMIC BANK	7.5	0.81%	EMAAR DEVELOPMENT PJSC	12.9	-2.27%	DEYAAR DEVELOPME	0.94	7,711.00

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,561.44							
Change	11.76	0.12%						
Previous Close	9,549.68		Financial	17,016.46	16,961.87	0.32%	0.08%	1.43%
Open	9,549.68		Telecommunication	4,312.72	4,263.60	1.15%	2.69%	7.60%
			Consumer Services	12,511.61	12,679.73	-1.33%	-2.91%	-4.08%
Day's High	9,563.74		Basic Material	4,632.96	4,627.75	0.11%	-1.54%	1.73%
Day's Low	9,520.57		Industrials	2,718.09	2,762.13	-1.59%	-1.92%	-0.02%
YTD Change	1.51%		Utilities	12,395.79	12,395.79	0.00%	-0.32%	-11.11%
			Energy	2,275.12	2,296.85	-0.95%	-0.99%	0.82%
Volume Mn	186,760.29		Health Care	2,577.77	2,583.58	-0.22%	-0.86%	7.05%
Value Traded Mn	880.38		Real Estate	11,305.55	11,364.05	-0.51%	-0.78%	0.52%
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
RAS AL KHAIMA POULTRY	1.8	7.14%	COMMERCIAL BANK INTERNATIONAL	0.68	-9.33%	MULTIPLY GROUP	2.13	18455.20
ESG EMIRATES STALLIONS GROU	10.22	4.61%	FOODCO NATIONAL FOODSTUFF CO	1.85	-7.50%	ABU DHABI ISLAMIC I	15.40	8042.36
ABU DHABI COMMERCIAL BANK	11.44	4.57%	FUJAIRAH CEMENT INDUSTRIES	0.295	-6.05%	ABU DHABI COMMER	11.44	7721.75
NATIONAL BANK OF RAS AL-KHAI	6.6	2.64%	EASY LEASE MOTOR CYCLE PRJSC	34.02	-5.50%	ESHRAQ INVESTMEN'	0.37	6006.48
GHITHA HOLDING PJSC	24.2	2.11%	ABU DHABI NATL CO FOR BUILDI	1.11	-4.31%	ABU DHABI NATIONA	0.60	5666.66

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,682.99							
Change	9.00	0.08%						
Previous Close	10673.99		Total Return	24,362.83	24,342.30	0.08%	0.21%	1.06%
Open	10673.99		Rayan Islamic	4,931.79	4,923.66	0.17%	-0.27%	1.26%
Day's High	10696.28		All Share	3,799.97	3,795.95	0.11%	0.23%	0.65%
Day's Low	10622.34		Banks & Finance	4,648.60	4,629.76	0.41%	0.69%	-1.84%
YTD Change	0.01058551		Industrials	4,357.75	4,346.53	0.26%	0.10%	2.62%
Volume Mn	164.243		Transportation	5,360.33	5,469.30	-1.99%	-0.89%	3.79%
Value Traded Mn	293.5765		Real Estate	1,618.20	1,610.50	0.48%	-0.52%	0.11%
Traded / Listed Stocks	20	51	Insurance	2,390.50	2,391.40	-0.04%	-0.28%	1.79%
			Telecommunications	1,993.71	2,003.22	-0.47%	-0.81%	10.84%
			Consumer Goods	7,838.30	7,814.90	0.30%	0.15%	2.24%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	QAR	%		QAR	%	Companies	QAR	000
WIDAM FOOD CO	2.48	3.25%	QATAR GAS TRANSPORT(NAKILAT)	4.39	-2.44%	EZDAN HOLDING GRC	0.98	20980.82
AL FALEH EDUCATION HOLDING	0.75	2.32%	DLALA HOLDING	1.15	-1.63%	SALAM INTERNATION	0.69	19108.95
DOHA BANK QPSC	2.09	2.01%	QATAR NAVIGATION	11.22	-1.49%	QATAR & OMAN INVI	0.78	17124.22
ESTITHMAR HOLDING QPSC	1.81	1.29%	EZDAN HOLDING GROUP	0.98	-1.31%	MAZAYA REAL ESTAT	0.59	11919.80
SALAM INTERNATIONAL INVESTME	0.69	1.18%	GULF WAREHOUSING COMPANY	3.16	-0.72%	BALADNA	1.36	11628.17

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,873.73							
Change	-18.12	-0.96%						
Previous Close	1,891.85		MSCI Bahrain	154.07	153.87	0.13%	1.06%	-2.92%
Open	1,891.85		MSCI Bahrain Domestic Islamic	60.29	60.20	0.16%	1.06%	-3.78%
Day's High	1893.540		MSCI Bahrain Net TR USD	420.68	420.14	0.13%	1.05%	-2.89%
Day's Low	1873.730							
YTD Change	-5.65%							
Volume Mn	442.59							
Value Traded Mn	0.152							
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
SEEF PROPERTIES	0.11	1.89%	ZAIN BAHRAIN BSCC	0.11	-4.35%	SEEF PROPERTIES	0.11	175.00
GULF HOTEL GROUP B.S.C	0.30	0.68%	ALUMINIUM BAHRAIN BSC	1.05	-3.67%	AL SALAM BANK BSC	0.20	159.33
-	-	-	BBK BSC	0.48	-2.06%	GFH FINANCIAL GROU	0.32	136.44
-	-	-	-	-	-	ZAIN BAHRAIN BSCC	0.11	104.35
-	-	-	-	-	-	GULF HOTEL GROUP	0.30	83.00

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,784.67							
Change	-11.74	-0.15%	Industrials	736.47	732.22	0.58%	1.77%	1.77%
Previous Close	7,796.41		Banks	1,941.94	1,956.18	-0.73%	7.30%	7.30%
Open	7,774.55		Consumer Service	1,031.58	1,001.45	3.01%	3.29%	3.29%
			Technology	1,047.60	1,018.50	2.86%	0.70%	0.70%
Day's High	7,796.00		Real Estate	1,502.70	1,488.85	0.93%	11.05%	11.05%
Day's Low	7,723.28		Financial Services	1,538.10	1,527.34	0.70%	1.82%	1.82%
YTD Change	5.73%		Telecom	1,013.15	1,001.76	1.14%	-0.45%	-0.45%
			Health Care	463.60	463.60	0.00%	1.16%	1.16%
Volume Mn	0.45		Insurance	2,041.80	2,040.49	0.06%	-0.65%	-0.65%
Value Traded Mn	108.50		Basic Materials	881.34	894.04	-1.42%	-3.28%	-3.28%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
METAL & RECYCLING CO	125.00	9.65%	ALKOUT INDUSTRIAL PROJECTS C	989.00	-9.68%	KUWAIT BUSINESS TC	121.00	76566.38
KUWAIT NATIONAL CINEMA CO	1350.00	8.96%	AL TAMDEEN INVESTMENT CO	874.00	-5.62%	KUWAIT REAL ESTAT	330.00	38636.15
KUWAIT REAL ESTATE HOLDING C	35.70	7.86%	COMMERCIAL FACILITIES CO	265.00	-3.99%	ARZAN FINANCIAL GF	287.00	36955.45
ENERGY HOUSE HOLDING CO KSCP	180.00	7.78%	AMAR FINANCE & LEASING CO	66.90	-3.74%	SOKOUK HOLDING CC	57.00	24158.36
NATIONAL PETROLEUM SERVICES	1024.00	7.56%	UNITED REAL ESTATE COMPANY	147.00	-3.29%	KUWAIT FINANCE HO	786.00	18221.37

Source: FSC