

Financial Services Company
GCC Daily Report



2025

Research Department

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FSC Daily Report

13/03/2025



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	3,643.01	0.5	(1.7)	21.2	21.2	3.4	3.0	1.81%
MSCI Emerging Markets Index	1,111.13	0.2	3.3	14.3	15.1	1.7	1.7	2.72%
MSCI FM FRONTIER MARKETS	566.93	(0.0)	6.4	-	12.1	1.5	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	586.18	0.0	2.9	10.8	13.9	1.6	1.7	4.08%
Muscat Stock Exchange MSX 30 Index	4,387.39	0.5	(4.1)	9.2	12.4	0.6	0.8	6.25%
Tadawul All Share Index	11,722.03	0.1	(2.6)	17.6	22.2	2.3	2.3	3.82%
Dubai Financial Market General Index	5,178.53	0.4	0.4	9.1	11.3	1.4	1.1	4.70%
FTSE ADX GENERAL INDEX	9,432.68	0.2	0.1	20.9	21.6	2.5	2.4	2.20%
Qatar Exchange Index	10,423.18	(0.1)	(1.4)	11.4	14.1	1.3	1.5	4.73%
Bahrain Bourse All Share Index	1,972.32	0.3	(0.7)	14.5	11.1	1.3	0.9	3.69%
Boursa Kuwait All Share Price Return Ir	7,907.97	(1.1)	7.4	20.7	20.9	1.9	1.6	2.96%

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	580.67	(0.1)	2.0	15.6	17.0	1.8	1.7	2.67%
MSCI AC Asia Ex. Japan Index	724.82	0.1	2.9	15.3	16.8	1.7	1.7	0.00%
Nikkei 225	36,790.03	(0.1)	(7.8)	18.9	25.5	1.9	1.9	1.90%
S&P/ASX 200	7,749.07	(0.5)	(5.0)	19.5	19.3	2.2	2.2	3.83%
Hang Seng Index	23,462.65	(0.6)	17.0	11.9	11.0	1.3	1.1	3.69%
NSE Nifty 50 Index	22,397.20	(0.3)	(5.3)	21.0	23.9	3.3	3.3	1.44%

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	181.28	0.8	6.7	15.1	16.2	2.1	1.9	3.13%
MSCI Emerging Markets Europe Index	142.54	2.0	20.4	8.5	7.2	1.3	1.0	3.54%
FTSE 100 Index	8,577.32	0.4	4.9	12.7	14.0	1.9	1.7	3.66%
Deutsche Boerse AG German Stock Inc	22,729.63	0.2	14.2	17.3	15.4	1.9	1.7	2.50%
CAC 40	8,027.88	0.5	8.8	16.4	16.1	1.9	1.8	3.06%

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	5,544.34	0.6	(4.8)	23.9	23.8	4.6	4.2	1.40%
S&P 500 INDEX	5,599.30	0.5	(4.8)	24.0	23.7	4.8	4.4	1.36%
Dow Jones Industrial Average	41,350.93	(0.2)	(2.8)	21.8	21.3	5.3	4.7	1.72%
NASDAQ Composite Index	17,648.45	1.2	(8.6)	35.0	39.1	6.4	6.0	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	553.08	0.6	0.6	-33%	142%
Gold Spot \$/Oz	2,944.10	0.3	12.2	0%	180%
BRENT CRUDE FUTR May25	70.63	-0.5	-4.4	-16%	52%
Generic 1st'OQA' Future	71.61	-0.1	-5.9	-43%	288%
LME COPPER 3MO (\$)	9,770.00	1.1	11.4	-10%	126%
SILVER SPOT \$/OZ	33.17	-0.2	14.8	-5%	177%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,387.39							
Change	23.31	0.53%						
Previous Close	4,364.08		Financial Sector	7,695.98	7,657.23	0.51%	-0.56%	-0.39%
Open	4,364.31		Industry Sector	5,629.18	5,546.25	1.50%	-3.48%	6.80%
Day's High	4,387.39		Services Sector	1,602.05	1,597.19	0.30%	-1.89%	-8.09%
Day's Low	4,354.11							
YTD Change	-4.13%							
Volume Mn	50.84							
MSX30 Value Traded Mn	13.03							
Traded Securities	48							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
MUSCAT INSURANCE	0.467	9.88%	MUSCAT CITY DESALINATION	0.063	-5.97%	NATIONAL BANK OM.	0.300	33000.00
VOLTAMP ENERGY	0.620	5.08%	NATIONAL FINANCE	0.128	-3.03%	ASYAD SHIPPING	0.123	3261.88
OMAN FLOUR MILLS	0.399	5.00%	MUSCAT GASES	0.080	-2.44%	OQ EXPLORATION AN	0.314	2210.62
NATIONAL BANK OMAN	0.300	3.45%	RENAISSANCE SERVICES	0.329	-1.50%	SOHAR INTERNATION	0.124	1979.38
OMAN EMIRATES HO.	0.065	3.17%	NATIONAL GAS	0.075	-1.32%	BANK MUSCAT	0.255	1914.00

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,722.03							
Change	17.10	0.15%	Tadawul Banks	12,794.21	12,742.40	0.41%	-0.42%	-0.02%
Previous Close	11,704.93		Tadawul Energy	4,925.21	4,972.55	-0.95%	-1.04%	-4.22%
Open	11,706.36		Tadawul Utilities	11,520.98	11,582.70	-0.53%	-4.14%	-10.52%
Day's High	11,757.82		Tadawul Telecom	8,576.54	8,590.99	-0.17%	-1.54%	-3.56%
Day's Low	11,684.94		Tadawul Insurance	9,658.89	9,577.50	0.85%	2.34%	-4.37%
YTD Change	-2.61%		Tadawul Retailing	7,705.80	7,728.55	-0.29%	-0.01%	-2.40%
Volume Mn	322,669.28		Tadawul Food & Beverages	5,610.54	5,587.99	0.40%	-3.19%	-5.35%
Value Traded Mn	5,077.01		Tadawul Media	21,654.10	20,996.46	3.13%	-5.29%	-15.12%
Traded / Listed Stocks	246	228	Tadawul Materials	5,154.52	5,135.62	0.37%	-0.07%	-1.39%
			Tadawul Capital Goods	13,944.64	14,042.45	-0.70%	0.08%	-8.51%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
AL JOUF MINERAL WATER BOTTLI	1.75	9.38%	NATIONAL BUILDING AND MARKET	177.60	-15.02%	AL-BAHA DEVELOPMI	0.39	53988.25
SAUDI GROUND SERVICES CO	52	7.22%	ADVANCE INTERNATIONAL COMMUN	3.69	-4.90%	SAUDI ARABIAN OIL (26.00	14277.95
SAUDI CHEMICAL CO HOLDING	8.43	5.64%	AYYAN INVESTMENT CO	16.60	-3.60%	TOURISM ENTERPRIS	0.83	7496.75
ZAMIL INDUSTRIAL INVESTMENT	30.9	5.10%	AME COMPANY FOR MEDICAL SUPP	135.20	-3.29%	ALINMA BANK	29.15	5359.55
SAUDI RESEARCH & MEDIA GROUP	173	4.09%	ALANDALUS PROPERTY CO	24.06	-2.91%	BATIC INVESTMENTS	2.79	4492.50

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,178.53							
Change	21.41	0.42%						
Previous Close	5,157.12		Real Estate & Construction	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Open	5,160.20		Banking	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
			Investment and Financial	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Day's High	5,191.26		Insurance	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Day's Low	5,153.17		Consumer Staples	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
YTD Change	0.00		Services	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
			Industrial	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Volume Mn	140,841.20		Telecommunication	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Value Traded Mn	600.88		Transportation	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
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
BHM CAPITAL FINANCIAL SERVIC	1.75	6.71%	DUBAI REFRESHMENTS COMPANY	18.1	-8.35%	UNION PROPERTIES F	0.58	24,517.77
AL SALAM BANK SUDAN	0.709	2.75%	AL FIRDOUS HOLDINGS PJSC	0.287	-2.71%	DUBAI ELECTRICITY &	2.49	8,532.96
EMAAR DEVELOPMENT PJSC	12.6	2.03%	DUBAI ISLAMIC INSURANCE CO	0.373	-2.61%	DRAKE & SCULL INTEI	0.34	7,823.88
COMMERCIAL BANK OF DUBAI	8	1.65%	GULF NAVIGATION HOLDING PJSC	5.21	-1.70%	EMAAR PROPERTIES I	13.40	6,100.03
ARAMEX PJSC	2.88	1.41%	DUBAI FINANCIAL MARKET PJSC	1.32	-1.49%	EMAAR DEVELOPMEI	12.60	5,473.92

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,432.68							
Change	16.93	0.18%						
Previous Close	9,415.75		Financial	17,006.42	17,018.86	-0.07%	-0.37%	-0.90%
Open	9,415.75		Telecommunication	4,224.30	4,185.01	0.94%	2.99%	3.12%
Day's High	9,453.23		Consumer Services	8,715.64	8,824.75	-1.24%	-5.00%	-10.48%
Day's Low	9,401.56		Basic Material	4,390.22	4,391.49	-0.03%	0.36%	-9.01%
YTD Change	0.15%		Industrials	2,523.19	2,512.44	0.43%	0.23%	-2.35%
			Utilities	12,157.41	12,038.22	0.99%	0.33%	0.66%
Volume Mn	311,910.84		Energy	2,177.96	2,151.44	1.23%	0.25%	-3.72%
Value Traded Mn	1,324.56		Health Care	2,018.59	1,992.87	1.29%	-7.54%	-9.44%
Traded / Listed Stocks	73	84	Real Estate	12,629.59	12,628.27	0.01%	0.82%	-3.04%

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 HOTELS	0.56	4.67%	HAYAH INSURANCE CO PJSC	1.52	-5.00%	DANA GAS	0.80	34124.68
RAS AL KHAIMAH WHITE CEMENT	1.15	4.55%	AL SEER MARINE SUPPLIES & EQ	2.77	-2.81%	MULTIPLY GROUP	1.78	28833.21
ABU DHABI NATIONAL OIL CO FO	3.49	3.87%	ABU DHABI AVIATION CO	5.78	-1.37%	BOROUGE	2.36	27201.32
MULTIPLY GROUP	1.78	3.49%	WAHA CAPITAL PJSC	1.53	-1.29%	ESHRAQ INVESTMEN'	0.34	14838.70
GHITHA HOLDING PJSC	18.72	3.43%	RAS AL KHAIMAH CERAMICS	2.45	-1.21%	ABU DHABI NATIONA	3.49	12643.55

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,423.18							
Change	-14.78	-0.14%	Total Return	24,405.74	24,422.94	-0.07%	-0.39%	0.35%
Previous Close	10437.96		Rayan Islamic	4,913.85	4,910.53	0.07%	-0.39%	0.41%
Open	10437.96		All Share	3,800.74	3,802.54	-0.05%	-0.52%	0.11%
			Banks & Finance	4,668.24	4,675.71	-0.16%	-0.68%	-0.39%
Day's High	10437.96		Industrials	4,310.96	4,315.24	-0.10%	-0.42%	-0.31%
Day's Low	10377.01		Transportation	5,581.11	5,576.95	0.07%	-0.23%	2.83%
YTD Change	-0.01399195		Real Estate	1,579.53	1,579.73	-0.01%	-1.16%	0.55%
			Insurance	2,311.62	2,309.13	0.11%	-0.85%	-0.85%
Volume Mn	144.397		Telecommunications	1,992.39	1,990.89	0.08%	-0.07%	1.71%
Value Traded Mn	381.6593		Consumer Goods	7,748.22	7,697.26	0.66%	0.13%	1.03%
Traded / Listed Stocks	20	51						

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	2.03	8.56%	UNITED DEVELOPMENT CO	1.02	-4.67%	EZDAN HOLDING GRC	0.97	26303.11
EZDAN HOLDING GROUP	0.97	2.54%	QATAR GENERAL INSURANCE & RE	1.12	-1.76%	ESTITHMAR HOLDING	2.03	22209.52
MEKDAM HOLDING GROUP	3.49	1.93%	INMA HOLDING COMPANY	3.53	-1.56%	BALADNA	1.16	14245.40
MANNAI CORPORATION QPSC	3.89	1.91%	QATAR & OMAN INVESTMENT CO	0.66	-1.35%	AL RAYAN BANK	2.30	9554.74
QATAR FUEL QSC	14.70	1.31%	DOHA BANK QPSC	1.96	-1.26%	QATAR ALUMINUM N	1.28	7364.02

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,972.32							
Change	5.27	0.27%	MSCI Bahrain	158.90	158.38	0.33%	-0.32%	0.37%
Previous Close	1,967.05		MSCI Bahrain Domestic Islamic	62.19	61.94	0.41%	-0.40%	-0.03%
Open	1,967.05		MSCI Bahrain Net TR USD	433.87	432.46	0.33%	-0.32%	0.35%
Day's High	1974.160							
Day's Low	1967.050							
YTD Change	-0.68%							
Volume Mn	1,298.63							
Value Traded Mn	0.317							
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	2.61%	ALUMINIUM BAHRAIN BSC	1.13	-0.44%	AL SALAM BANK BSC	0.23	55724.50
AL SALAM BANK BSC	0.23	2.23%	APM TERMINALS BAHRAIN BSC	1.19	-0.42%	GFH FINANCIAL GROI	0.32	600.00
ARAB BANKING CORP BSC-\$US	0.37	1.37%	-	-	-	ZAIN BAHRAIN BSCC	0.12	136.14
NATIONAL BANK OF BAHRAIN BSC	0.50	0.20%	-	-	-	SEEF PROPERTIES	0.12	74.21
-	-	-	-	-	-	APM TERMINALS BAH	1.19	67.00

Source: FSC

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Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,907.97							
Change	-89.72	-1.12%	Industrials	731.65	742.90	-1.51%	-4.09%	1.11%
Previous Close	7,997.69		Banks	1,998.34	2,009.22	-0.54%	-1.51%	10.42%
Open	8,007.99		Consumer Service	1,000.75	1,001.45	-0.07%	-3.44%	0.21%
			Technology	1,171.27	1,156.72	1.26%	-27.48%	12.59%
Day's High	8,011.93		Real Estate	1,495.38	1,547.92	-3.39%	-4.30%	10.51%
Day's Low	7,891.68		Financial Services	1,508.25	1,521.48	-0.87%	-3.86%	-0.15%
YTD Change	7.41%		Telecom	1,031.85	1,033.27	-0.14%	-3.47%	1.39%
			Health Care	538.70	538.70	0.00%	3.74%	17.55%
Volume Mn	0.41		Insurance	2,081.69	2,084.68	-0.14%	0.82%	1.29%
Value Traded Mn	129.87		Basic Materials	866.20	877.59	-1.30%	-7.05%	-4.94%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
EKTTITAB HOLDING CO SAK	13.90	5.30%	KUWAIT BUSINESS TOWN REAL ES	96.40	-54.74%	OULA FUEL MARKETII	366.00	113964.66
KUWAIT HOTELS SAK	275.00	4.96%	OULA FUEL MARKETING CO	366.00	-45.70%	KUWAIT BUSINESS TC	96.40	82195.72
AL-DEERA HOLDING CO	409.00	2.25%	SOOR FUEL MARKETING CO KSC	256.00	-22.66%	ENERGY HOUSE HOLI	178.00	14568.78
BURGAN CO FOR WELL DRILLING	147.00	2.08%	UNICAP INVESTMENT AND FINANC	220.00	-12.00%	AL ARABIYA REAL EST	90.00	12984.33
AL MASAKEN INTL REAL ESTATE	41.00	1.99%	ALARGAN INTERNATIONAL REAL	90.20	-9.44%	KUWAIT FINANCE HO	784.00	10215.61

Source: FSC