

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

17/03/2025



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	3,665.71	1.8	(1.1)	21.4	21.2	3.5	3.0	1.80%
MSCI Emerging Markets Index	1,119.61	1.2	4.1	14.4	15.1	1.8	1.7	2.71%
MSCI FM FRONTIER MARKETS	566.01	0.2	6.3	-	12.0	1.6	1.6	4.18%

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	584.70	(0.2)	2.7	10.8	13.9	1.6	1.7	4.13%
Muscat Stock Exchange MSX 30 Index	4,379.47	(0.1)	(4.3)	9.5	12.4	0.9	0.8	6.22%
Tadawul All Share Index	11,915.21	0.5	(1.0)	16.7	22.2	2.3	2.3	3.76%
Dubai Financial Market General Index	5,160.90	0.4	0.0	9.1	11.3	1.4	1.1	4.76%
FTSE ADX GENERAL INDEX	9,447.13	0.3	0.3	20.9	21.6	2.5	2.4	2.20%
Qatar Exchange Index	10,403.87	(0.2)	(1.6)	11.4	14.1	1.3	1.5	4.74%
Bahrain Bourse All Share Index	1,967.72	(0.1)	(0.9)	14.6	11.1	1.3	0.9	3.70%
Boursa Kuwait All Share Price Return Ir	7,876.56	(0.0)	7.0	20.4	20.9	1.9	1.6	2.97%

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	581.69	0.9	2.2	15.6	17.0	1.8	1.7	2.67%
MSCI AC Asia Ex. Japan Index	726.51	1.0	3.2	15.4	16.8	1.7	1.7	0.00%
Nikkei 225	37,396.52	0.9	(6.3)	19.0	25.5	1.9	1.9	1.87%
S&P/ASX 200	7,854.06	0.8	(3.7)	19.7	19.3	2.2	2.2	3.78%
Hang Seng Index	24,145.57	0.8	20.4	12.1	11.0	1.3	1.1	3.60%
NSE Nifty 50 Index	22,508.75	0.5	(4.8)	20.9	23.9	3.3	3.3	1.43%

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	183.12	1.1	7.8	15.3	16.2	2.2	1.9	3.10%
MSCI Emerging Markets Europe Index	146.79	1.9	24.0	9.0	7.2	1.3	1.0	3.44%
FTSE 100 Index	8,656.23	0.3	5.9	12.8	14.0	1.9	1.7	3.64%
Deutsche Boerse AG German Stock Inc	23,031.13	0.2	15.7	16.8	15.4	1.9	1.7	2.46%
CAC 40	8,056.43	0.4	9.2	16.4	16.2	1.9	1.8	3.05%

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	5,582.01	2.1	(4.2)	24.2	23.8	4.6	4.2	1.39%
S&P 500 INDEX	5,638.94	2.1	(4.1)	24.1	23.7	4.8	4.4	1.35%
Dow Jones Industrial Average	41,488.19	1.7	(2.5)	21.8	21.3	5.3	4.7	1.71%
NASDAQ Composite Index	17,754.09	2.6	(8.1)	35.2	39.1	6.4	6.0	0.74%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	551.69	0.2	0.4	-33%		142%	
Gold Spot \$/Oz	2,996.64	0.4	14.2	0%		185%	
BRENT CRUDE FUTR May25	71.30	1.0	-3.5	-16%		54%	
Generic 1st'OQA' Future	72.40	1.1	-4.8	-42%		292%	
LME COPPER 3MO (\$)	9,780.50	0.0	11.5	-10%		126%	
SILVER SPOT \$/OZ	33.81	0.0	17.0	-3%		182%	

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,379.47							
Change	-2.44	-0.06%						
Previous Close	4,381.90		Financial Sector	7,640.61	7,703.79	-0.82%	-1.28%	-1.10%
Open	4,381.90		Industry Sector	5,622.43	5,623.79	-0.02%	-3.60%	6.67%
Day's High	4,384.73		Services Sector	1,611.23	1,599.15	0.76%	-1.33%	-7.56%
Day's Low	4,362.74							
YTD Change	-4.31%							
Volume Mn	71.19							
MSX30 Value Traded Mn	10.53							
Traded Securities	61							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
SEMBICORP SALALAH	0.091	4.60%	AL ANWAR CERAMIC	0.099	-10.00%	SOHAR INTERNATIONAL	0.123	44356.51
MUSCAT THREAD MILLS	0.125	4.17%	FINANCIAL CORPORATION	0.036	-10.00%	BANK MUSCAT	0.256	8687.56
GALFAR ENGINEERING & CONTRACTING	0.076	4.11%	SHARQIYAH DESALINATION	0.135	-8.78%	ASYAD SHIPPING	0.123	3637.76
OOREDOO	0.180	2.86%	AHLI BANK	0.167	-5.11%	OQ BASE INDUSTRIES	0.103	3437.44
OMAN REIT FUND	0.074	2.78%	AHLI Bank Bonds24	0.095	-5.00%	GALFAR ENGINEERING	0.076	1566.60

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,915.21							
Change	61.43	0.52%	Tadawul Banks	12,995.63	12,858.41	1.07%	1.60%	1.55%
Previous Close	11,853.78		Tadawul Energy	4,935.94	4,945.88	-0.20%	0.25%	-4.01%
Open	11,882.62		Tadawul Utilities	11,800.05	11,764.81	0.30%	1.57%	-8.36%
Day's High	11,937.46		Tadawul Telecom	8,739.84	8,673.09	0.77%	1.77%	-1.72%
Day's Low	11,863.55		Tadawul Insurance	9,737.56	9,739.89	-0.02%	0.68%	-3.59%
YTD Change	-1.01%		Tadawul Retailing	7,802.60	7,777.66	0.32%	1.43%	-1.17%
Volume Mn	198,611.27		Tadawul Food & Beverages	5,705.92	5,674.99	0.55%	1.06%	-3.74%
Value Traded Mn	5,963.70		Tadawul Media	22,918.22	23,306.62	-1.67%	4.19%	-10.16%
Traded / Listed Stocks	246	228	Tadawul Materials	5,302.31	5,255.84	0.88%	3.21%	1.44%
			Tadawul Capital Goods	14,103.38	14,086.58	0.12%	1.30%	-7.46%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
AL HASOUB CO	63.2	9.72%	NATIONAL ENVIRONMENTAL RECYC	7.50	-3.85%	AL-BAHA DEVELOPMENT	0.39	12860.44
RETAL URBAN DEVELOPMENT CO	15.8	7.05%	OBEIKAN GLASS COMPANY	47.00	-3.09%	SAUDI ARABIAN OIL CO	26.00	12084.60
NATIONAL BUILDING AND MARKET	203	6.84%	ARRIYADH DEVELOPMENT COMPANY	35.00	-2.91%	THE SAUDI NATIONAL	35.60	5876.94
ALKHORAYEF WATER & POWER TEC	170.6	6.76%	ALMUNAJEM FOODS CO	85.90	-2.61%	ELECTRICAL INDUSTRIES	6.20	4539.42
AL JOUF MINERAL WATER BOTTLING	1.81	5.85%	HALWANI BROS CO	49.65	-2.46%	NATIONAL INDUSTRIES	9.44	4500.63

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,160.90							
Change	20.29	0.39%						
Previous Close	5,140.61		Real Estate & Construction	49,434.90	49,434.90	0.00%	0.00%	49,434.90
Open	5,145.23		Banking	49,434.90	49,434.90	0.00%	0.00%	49,434.90
			Investment and Financial	49,434.90	49,434.90	0.00%	0.00%	49,434.90
Day's High	5,179.92		Insurance	49,434.90	49,434.90	0.00%	0.00%	49,434.90
Day's Low	5,136.26		Consumer Staples	49,434.90	49,434.90	0.00%	0.00%	49,434.90
YTD Change	0.00		Services	49,434.90	49,434.90	0.00%	0.00%	49,434.90
			Industrial	49,434.90	49,434.90	0.00%	0.00%	49,434.90
Volume Mn	83,709.95		Telecommunication	49,434.90	49,434.90	0.00%	0.00%	49,434.90
Value Traded Mn	288.83		Transportation	49,434.90	49,434.90	0.00%	0.00%	49,434.90
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 INVESTMENT BANK	90	5.32%	AL RAMZ CORPORATION INVESTME	1.18	-6.35%	UNION PROPERTIES F	0.57	22,084.68
TAKAFUL EMARAT INSURANCE	1.35	3.85%	BHM CAPITAL FINANCIAL SERVIC	1.63	-4.68%	DRAKE & SCULL INTEI	0.34	10,467.97
SHUAA CAPITAL PSC	0.218	2.83%	AL SALAM BANK SUDAN	0.674	-2.32%	EMAAR PROPERTIES I	13.45	8,791.54
EMAAR PROPERTIES PJSC	13.45	2.67%	ISLAMIC ARAB INSURANCE COM	0.39	-1.27%	DUBAI ISLAMIC BANK	7.49	4,751.17
DUBAI ISLAMIC INSURANCE CO	0.388	1.84%	GULF NAVIGATION HOLDING PJSC	5.34	-1.11%	EMAAR DEVELOPMEI	12.45	4,514.11

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,447.13							
Change	28.46	0.30%						
Previous Close	9,418.67		Financial	17,002.30	16,954.35	0.28%	0.28%	-0.92%
Open	9,418.67		Telecommunication	4,268.51	4,283.25	-0.34%	-0.34%	4.20%
Day's High	9,452.03		Consumer Services	8,941.20	8,820.64	1.37%	1.37%	-8.16%
Day's Low	9,418.67		Basic Material	4,489.07	4,366.14	2.82%	2.82%	-6.96%
YTD Change	0.30%		Industrials	2,553.68	2,523.30	1.20%	1.20%	-1.17%
			Utilities	12,077.95	12,077.95	0.00%	0.00%	0.00%
Volume Mn	232,366.23		Energy	2,158.40	2,169.95	-0.53%	-0.53%	-4.58%
Value Traded Mn	766.96		Health Care	2,093.89	2,032.28	3.03%	3.03%	-6.06%
Traded / Listed Stocks	73	84	Real Estate	12,657.98	12,572.15	0.68%	0.68%	-2.82%

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%	AL DHAFRA INSURANCE CO. P.S.	4.86	-10.00%	BOROUGE	2.44	38242.18
GHITHA HOLDING PJSC	19.5	7.38%	RAS AL KHAIMAH WHITE CEMENT	1.05	-8.70%	ESHRAQ INVESTMEN'	0.38	31356.76
ESHRAQ INVESTMENTS PJSC	0.375	4.46%	ARAM GROUP	1.52	-8.43%	ABU DHABI NATIONA	0.56	22726.33
BOROUGE	2.44	3.83%	ALKHALEEF INVESTMENT	3.8	-5.94%	MULTIPLY GROUP	1.81	19146.46
RESPONSE PLUS HOLDING PJSC	3.96	3.39%	ABU DHABI NATL CO FOR BUILDI	0.75	-5.90%	RAK PROPERTIES	1.27	11760.28

Source: FSC

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Qatar Stock Exchange

Close	10,403.87		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-17.93	-0.17%	Total Return	24,360.54	24,402.51	-0.17%	-0.19%	0.17%
Previous Close	10421.8		Rayan Islamic	4,924.59	4,916.24	0.17%	0.22%	0.63%
Open	10421.8		All Share	3,796.38	3,801.38	-0.13%	-0.11%	-0.01%
			Banks & Finance	4,652.99	4,666.43	-0.29%	-0.33%	-0.72%
Day's High	10440.56		Industrials	4,338.69	4,320.92	0.41%	0.64%	0.33%
Day's Low	10387.02		Transportation	5,494.99	5,573.18	-1.40%	-1.54%	1.24%
YTD Change	-0.01581859		Real Estate	1,604.10	1,587.27	1.06%	1.56%	2.11%
			Insurance	2,291.72	2,312.13	-0.88%	-0.86%	-1.70%
Volume Mn	206.361		Telecommunications	1,986.02	1,991.61	-0.28%	-0.32%	1.38%
Value Traded Mn	439.7565		Consumer Goods	7,801.36	7,732.58	0.89%	0.69%	1.72%
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
QATAR GERMAN CO FOR MEDICAL	1.36	9.93%	DOHA INSURANCE CO	2.38	-6.33%	EZDAN HOLDING GR	1.02	38575.09
WIDAM FOOD CO	2.32	4.28%	QATAR GENERAL INSURANCE & RE	1.07	-4.12%	QATAR GERMAN CO I	1.36	18259.48
EZDAN HOLDING GROUP	1.02	3.15%	QATAR GAS TRANSPORT(NAKILAT)	4.63	-2.41%	BALADNA	1.17	17644.25
SALAM INTERNATIONAL INVESTME	0.67	2.93%	QATAR ISLAMIC BANK	20.85	-1.18%	UNITED DEVELOPMEI	1.04	14546.81
MEKDAM HOLDING GROUP	3.45	2.68%	QATAR INSURANCE CO	1.94	-0.97%	ESTITHMAR HOLDINC	2.13	14535.79

Bahrain Bourse

Close	1,967.72		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-1.28	-0.06%	MSCI Bahrain	159.39	159.74	-0.22%	-0.22%	0.68%
Previous Close	1,969.00		MSCI Bahrain Domestic Islamic	62.55	62.60	-0.08%	-0.07%	0.55%
Open	1,969.00		MSCI Bahrain Net TR USD	436.21	436.21	0.00%	0.00%	0.90%
Day's High	1969.250							
Day's Low	1965.520							
YTD Change	-0.92%							
Volume Mn	56,849.35							
Value Traded Mn	11.457							
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
ARAB INSURANCE GROUP(BSC)-\$	0.96	9.09%	AL SALAM BANK BSC	0.23	-1.75%	AL SALAM BANK BSC	0.23	408.21
BMMI BSC	0.42	1.22%	SEEF PROPERTIES	0.12	-1.67%	NATIONAL BANK OF I	0.50	377.20
ALUMINIUM BAHRAIN BSC	1.13	0.44%	APM TERMINALS BAHRAIN BSC	1.17	-1.27%	BAHRAIN NATIONAL I	0.50	82.03
-	-	-	ZAIN BAHRAIN BSCC	0.12	-0.85%	ZAIN BAHRAIN BSCC	0.12	63.50
-	-	-	ARAB BANKING CORP BSC-\$US	0.37	-0.81%	BMMI BSC	0.42	47.04

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Boursa Kuwait

Close	7,876.56		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-3.74	-0.05%	Industrials	738.38	737.07	0.18%	-3.21%	2.04%
Previous Close	7,880.30		Banks	1,985.28	1,984.49	0.04%	-2.15%	9.70%
Open	7,897.05		Consumer Service	987.06	999.39	-1.23%	-4.76%	-1.16%
			Technology	1,091.25	1,142.17	-4.46%	-32.43%	4.90%
Day's High	7,900.12		Real Estate	1,494.04	1,499.48	-0.36%	-4.38%	10.41%
Day's Low	7,825.94		Financial Services	1,491.62	1,500.48	-0.59%	-4.92%	-1.25%
YTD Change	6.98%		Telecom	1,029.06	1,028.07	0.10%	-3.73%	1.11%
			Health Care	569.11	569.11	0.00%	9.59%	24.18%
Volume Mn	0.23		Insurance	2,082.89	2,078.35	0.22%	0.88%	1.35%
Value Traded Mn	61.83		Basic Materials	883.25	868.49	1.70%	-5.22%	-3.07%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
ENERGY HOUSE HOLDING CO KSCP	189.00	9.88%	GULF INVESTMENT HOUSE KSC	576.00	-5.26%	KUWAIT BUSINESS TC	130.00	40784.73
ALARGAN INTERNATIONAL REAL	92.00	5.75%	DAR AL THURAYA REAL ESTATE C	98.80	-5.00%	OULA FUEL MARKETII	420.00	17741.68
NATIONAL INDUSTRIES CO KSC	224.00	5.66%	NOOR FINANCIAL INVESTMENT CO	319.00	-4.78%	KUWAIT REAL ESTATI	320.00	14575.35
AL ARABIYA REAL ESTATE CO	89.00	4.83%	AUTOMATED SYSTEMS CO KSCC	150.00	-4.46%	PRIVATIZATION HOLI	47.10	13936.34
REAL ESTATE TRADE CENTERS CO	53.50	3.88%	EKTTITAB HOLDING CO SAK	13.10	-4.38%	KUWAIT PROJECTS HI	96.50	13563.94

Source: FSC