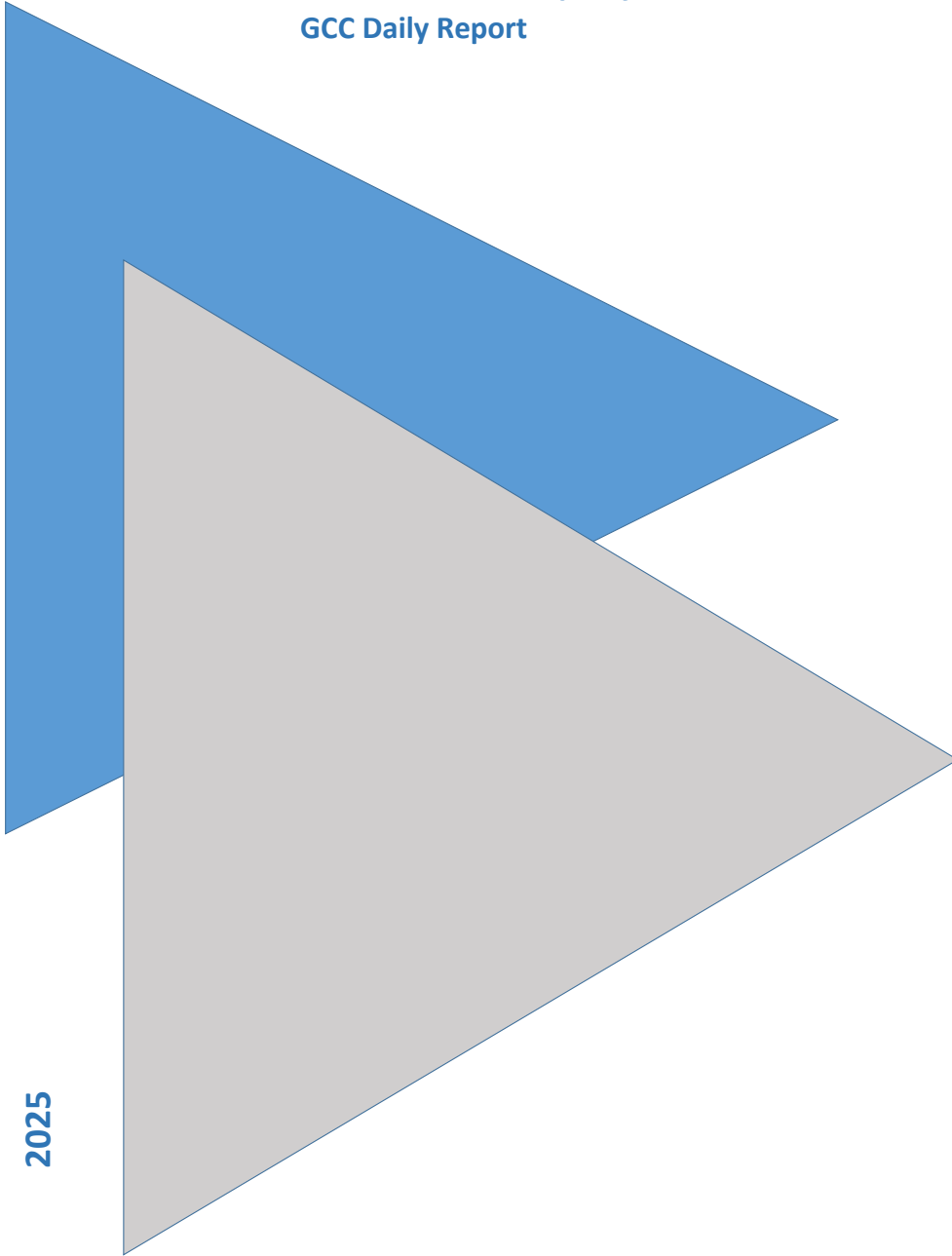


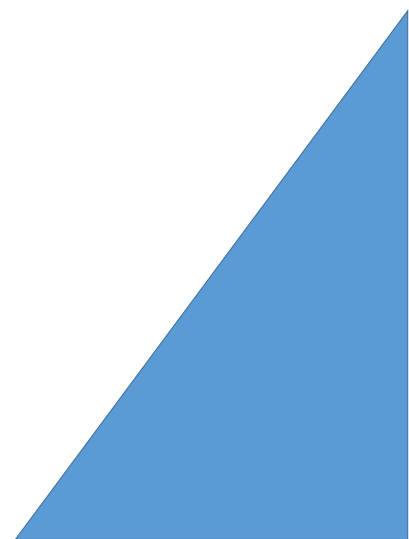
Financial Services Company
GCC Daily Report



2025

Research Department

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



FSC Daily Report

20/03/2025



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	3,701.87	0.8	(0.2)	21.5	21.2	3.5	3.0	1.78%
MSCI Emerging Markets Index	1,143.29	(0.2)	6.3	15.4	15.1	1.9	1.7	2.63%
MSCI FM FRONTIER MARKETS	569.73	(0.1)	7.0	-	12.0	1.6	1.6	4.16%

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	585.04	(0.5)	2.7	10.9	13.9	1.6	1.7	4.15%
Muscat Stock Exchange MSX 30 Index	4,412.19	0.6	(3.6)	9.5	12.5	0.9	0.8	6.22%
Tadawul All Share Index	11,748.82	0.3	(2.4)	17.7	22.2	2.3	2.3	3.73%
Dubai Financial Market General Index	5,129.18	0.2	(0.6)	9.0	11.3	1.4	1.1	4.79%
FTSE ADX GENERAL INDEX	9,374.32	(0.7)	(0.5)	21.0	21.7	2.5	2.4	2.25%
Qatar Exchange Index	10,316.56	(0.7)	(2.4)	11.4	14.1	1.3	1.5	4.80%
Bahrain Bourse All Share Index	1,962.09	(0.1)	(1.2)	14.6	11.2	1.3	0.9	9.05%
Boursa Kuwait All Share Price Return Ir	7,968.24	0.4	8.2	13.2	20.9	2.0	1.6	2.93%

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	593.95	(0.2)	4.3	16.2	17.0	1.9	1.7	2.62%
MSCI AC Asia Ex. Japan Index	743.55	(0.1)	5.6	15.8	16.8	1.8	1.7	0.00%
Nikkei 225	37,751.88	(0.2)	(5.4)	19.4	25.5	2.0	1.9	1.85%
S&P/ASX 200	7,918.89	1.2	(2.9)	19.6	19.3	2.2	2.2	3.76%
Hang Seng Index	24,219.95	(2.2)	20.7	12.5	11.0	1.4	1.1	3.59%
NSE Nifty 50 Index	23,190.65	1.2	(1.9)	21.3	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	186.00	0.2	9.5	15.6	16.2	2.2	2.0	3.06%
MSCI Emerging Markets Europe Index	143.20	(3.6)	21.0	11.0	7.2	1.4	1.0	3.46%
FTSE 100 Index	8,684.22	(0.3)	6.3	13.2	14.0	2.0	1.7	3.63%
Deutsche Boerse AG German Stock Inc	22,934.90	(1.5)	15.2	17.2	15.5	1.9	1.7	2.47%
CAC 40	8,089.22	(1.0)	9.6	16.7	16.1	2.0	1.8	3.04%

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	5,624.52	1.1	(3.5)	24.1	23.9	4.6	4.2	1.38%
S&P 500 INDEX	5,675.29	1.1	(3.5)	24.3	23.7	4.9	4.4	1.34%
Dow Jones Industrial Average	41,964.63	0.9	(1.4)	22.1	21.3	5.4	4.7	1.70%
NASDAQ Composite Index	17,750.79	1.4	(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	556.90	0.5	1.3	-32%	144%
Gold Spot \$/Oz	3,032.38	-0.5	15.5	-1%	188%
BRENT CRUDE FUTR May25	70.85	0.1	-4.1	-16%	53%
Generic 1st'OQA' Future	72.54	0.2	-4.6	-42%	293%
LME COPPER 3MO (\$)	9,987.50	0.8	13.9	-8%	131%
SILVER SPOT \$/OZ	33.29	-1.5	15.2	-5%	178%

Source: FSC

I CR No. 1287869 | Tel: +968 24825600 | Fax: +968 24817205 | Email: info@fscoman.net | Web: www.fscoman.com

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,412.19							
Change	25.88	0.59%						
Previous Close	4,386.31		Financial Sector	7,720.30	7,688.21	0.42%	-0.25%	-0.07%
Open	4,385.96		Industry Sector	5,668.18	5,652.70	0.27%	-2.81%	7.54%
Day's High	4,412.88		Services Sector	1,607.23	1,602.34	0.30%	-1.57%	-7.79%
Day's Low	4,380.97							
YTD Change	-3.59%							
Volume Mn	32.70							
MSX30 Value Traded Mn	6.83							
Traded Securities	53							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
LIVA CONV.BONDS 24	0.100	53.85%	OMAN NATIONAL ENGINEERING & INVEST	0.114	-6.56%	OQ BASE INDUSTRIES	0.102	6358.31
SOHAR INTERNATIONAL BANK	0.129	3.20%	OMAN UNITED INSURANCE	0.230	-5.74%	BANK MUSCAT	0.261	4996.40
AL SUWADI POWER	0.066	3.13%	OMAN EMIRATES HO.	0.061	-4.69%	OQ GAS NETWORKS	0.131	4145.50
NATIONAL GAS	0.076	2.70%	TAKAFUL OMAN	0.043	-4.44%	ASYAD SHIPPING	0.123	3507.44
OMAN FLOUR MILLS	0.390	2.63%	SALALAH PORT SERVICES	0.235	-4.08%	OQ EXPLORATION AN	0.309	2215.94

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,748.82		Tadawul Banks	12,926.39	12,985.89	-0.46%	1.06%	1.01%
Change	39.39	0.34%	Tadawul Energy	4,844.28	4,759.89	1.77%	-1.61%	-5.79%
Previous Close	11,709.43		Tadawul Utilities	11,617.69	11,401.23	1.90%	0.00%	-9.77%
Open	11,719.11		Tadawul Telecom	8,694.80	8,668.53	0.30%	1.25%	-2.23%
Day's High	11,763.81		Tadawul Insurance	9,447.37	9,373.52	0.79%	-2.32%	-6.47%
Day's Low	11,681.86		Tadawul Retailing	7,599.03	7,613.56	-0.19%	-1.22%	-3.75%
YTD Change	-2.39%		Tadawul Food & Beverages	5,633.45	5,647.42	-0.25%	-0.23%	-4.97%
Volume Mn	191,673.78		Tadawul Media	22,496.08	22,195.01	1.36%	2.27%	-11.82%
Value Traded Mn	4,258.01		Tadawul Materials	5,167.01	5,154.37	0.25%	0.58%	-1.15%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	13,674.95	13,564.74	0.81%	-1.78%	-10.28%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
MOHAMMED HASAN AL NAQOOL SON	46.9	10.35%	ENMA AL-RAWABI COMPANY	28.00	-6.51%	SAUDI ARABIAN OIL C	25.50	10948.33
SAUDI CABLE CO	121.4	3.76%	ADVANCE INTERNATIONAL COMMUN	3.38	-5.59%	AL-BAHA DEVELOPMI	0.38	8491.58
AL BABBAIN POWER & TELECOMMU	42.15	3.56%	LADUN INVESTMENT CO	4.21	-5.39%	TOURISM ENTERPRIS	0.81	4558.54
NATIONAL ENVIORNMENTAL RECYC	7.62	3.39%	GULF GENERAL COOPERATIVE INS	9.69	-4.81%	ELECTRICAL INDUSTR	6.01	3784.60
THEEB RENT A CAR CO	67.8	3.35%	SAUDIA DAIRY & FOODSTUFF CO	301.40	-4.26%	SAUDI CHEMICAL CO	8.60	3141.21

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,129.18							
Change	12.07	0.24%						
Previous Close	5,117.11		Real Estate & Construction	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,120.97		Banking	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	5,144.82		Insurance	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,104.06		Consumer Staples	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	-0.01		Services	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
			Industrial	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	113,440.93		Telecommunication	#N/A	#N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	415.76		Transportation	#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
SHUAA CAPITAL PSC	0.234	2.18%	EMIRATES INVESTMENT BANK	80.1	-10.00%	UNION PROPERTIES F	0.58	23,550.17
DUBAI ELECTRICITY & WATER AU	2.47	1.23%	AL SALAM BANK SUDAN	0.65	-4.27%	DRAKE & SCULL INTEI	0.34	18,339.08
EMIRATES NBD PJSC	19.65	1.03%	DUBAI ISLAMIC INSURANCE CO	0.366	-3.68%	EMAAAR PROPERTIES I	13.35	6,451.86
AIR ARABIA PJSC	3.47	0.87%	NATIONAL CEMENT CO	3.59	-2.97%	DUBAI ISLAMIC BANK	7.49	5,881.25
DUBAI INVESTMENTS PJSC	2.34	0.43%	TAKAFUL EMARAT INSURANCE	1.3	-2.26%	DUBAI ELECTRICITY &	2.47	4,399.31

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,374.32							
Change	-63.39	-0.67%						
Previous Close	9,437.71		Financial	16,838.54	16,979.25	-0.83%	-0.68%	-1.88%
Open	9,437.71		Telecommunication	4,253.77	4,278.33	-0.57%	-0.69%	3.84%
Day's High	9,437.71		Consumer Services	9,177.40	8,996.79	2.01%	4.04%	-5.73%
Day's Low	9,369.60		Basic Material	4,427.26	4,454.57	-0.61%	1.40%	-8.24%
YTD Change	-0.47%		Industrials	2,521.82	2,521.29	0.02%	-0.06%	-2.40%
			Utilities	12,435.52	12,475.25	-0.32%	2.96%	2.96%
Volume Mn	242,385.88		Energy	2,165.63	2,167.25	-0.07%	-0.20%	-4.26%
Value Traded Mn	1,140.71		Health Care	2,125.72	2,110.71	0.71%	4.60%	-4.63%
Traded / Listed Stocks	73	84	Real Estate	12,397.99	12,611.48	-1.69%	-1.39%	-4.81%

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	5.88	12.00%	RAS AL KHAIMA POULTRY	1.53	-8.38%	MULTIPLY GROUP	1.83	17841.09
ESG EMIRATES STALLIONS GROU	8.88	5.59%	FIRST ABU DHABI BANK PJSC	13.36	-6.31%	ESHRAQ INVESTMEN	0.37	14681.35
GULF CEMENT CO	0.705	3.68%	HAYAH INSURANCE CO PJSC	1.5	-6.25%	ABU DHABI NATIONA	0.56	13751.69
SHARJAH CEMENT & INDUS DEVEL	0.699	3.56%	EMIRATES INSURANCE CO. (PSC)	7.6	-4.40%	DANA GAS	0.81	8615.22
SUDATEL TELECOM GROUP LTD	0.31	2.65%	EMSTEEL BUILDING MATERIALS	1.17	-3.31%	BOROUGE	2.41	7384.64

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,316.56							
Change	-68.16	-0.66%						
Previous Close	10384.72		Total Return	24,185.90	24,345.70	-0.66%	-0.90%	-0.55%
Open	10384.72		Rayan Islamic	4,895.31	4,926.65	-0.64%	-0.38%	0.03%
Day's High	10404.22		All Share	3,768.12	3,790.07	-0.58%	-0.86%	-0.75%
Day's Low	10307.93		Banks & Finance	4,578.19	4,601.26	-0.50%	-1.93%	-2.31%
YTD Change	-0.02407796		Industrials	4,327.40	4,353.15	-0.59%	0.38%	0.07%
Volume Mn	103.212		Transportation	5,650.69	5,733.57	-1.45%	1.25%	4.11%
Value Traded Mn	276.3608		Real Estate	1,594.21	1,609.50	-0.95%	0.93%	1.48%
Traded / Listed Stocks	20	51	Insurance	2,302.11	2,298.75	0.15%	-0.41%	-1.26%
			Telecommunications	1,957.18	1,970.77	-0.69%	-1.77%	-0.09%
			Consumer Goods	7,803.87	7,812.41	-0.11%	0.72%	1.75%

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	2.20	1.81%	QATAR ELECTRICITY & WATER CO	14.73	-1.60%	QATAR ALUMINUM A	1.30	18994.83
QATAR ISLAMIC INSURANCE GROU	8.95	1.65%	QATAR GAS TRANSPORT(NAKILAT)	4.77	-1.57%	AL RAYAN BANK	2.31	11484.71
QATAR EXCHANGE INDEX ETF	10.49	0.67%	UNITED DEVELOPMENT CO	1.03	-1.52%	MESAIEED PETROCHE	1.43	8679.06
AL MEERA CONSUMER GOODS CO	15.15	0.66%	AL FALEH EDUCATION HOLDING	0.72	-1.50%	EZDAN HOLDING GR	0.99	7455.89
MEKDAM HOLDING GROUP	3.55	0.57%	QATAR NAVIGATION	10.72	-1.38%	BALADNA	1.19	6550.90

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,962.09							
Change	-2.86	-0.15%						
Previous Close	1,964.95		MSCI Bahrain	159.25	159.20	0.04%	-0.31%	0.59%
Open	1,964.95		MSCI Bahrain Domestic Islamic	62.30	62.27	0.04%	-0.48%	0.15%
Day's High	1964.950		MSCI Bahrain Net TR USD	436.27	434.68	0.37%	0.01%	0.91%
Day's Low	1960.160							
YTD Change	-1.20%							
Volume Mn	8,385.64							
Value Traded Mn	0.697							
Traded / Listed Stocks	40	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	-4.17%	AL SALAM BANK BSC	0.23	429.67
-	-	-	BBK BSC	0.50	-0.40%	ALUMINIUM BAHRAII	1.11	368.19
-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.50	-0.20%	NATIONAL BANK OF B	0.50	340.00
-	-	-	-	-	-	ZAIN BAHRAIN BSCC	0.12	179.04
-	-	-	-	-	-	BBK BSC	0.50	74.14

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,968.24							
Change	32.01	0.40%	Industrials	739.80	741.49	-0.23%	-3.02%	2.23%
Previous Close	7,936.23		Banks	2,017.41	2,006.44	0.55%	-0.57%	11.47%
Open	7,946.43		Consumer Service	953.13	958.96	-0.61%	-8.03%	-4.56%
			Technology	1,091.25	1,105.80	-1.32%	-32.43%	4.90%
Day's High	7,978.87		Real Estate	1,496.32	1,495.55	0.05%	-4.24%	10.58%
Day's Low	7,938.21		Financial Services	1,493.22	1,491.96	0.08%	-4.82%	-1.15%
YTD Change	8.23%		Telecom	1,024.20	1,029.13	-0.48%	-4.18%	0.64%
			Health Care	568.79	568.79	0.00%	9.53%	24.11%
Volume Mn	0.26		Insurance	2,105.51	2,074.83	1.48%	1.97%	2.45%
Value Traded Mn	69.83		Basic Materials	882.35	894.02	-1.31%	-5.32%	-3.17%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
OULA FUEL MARKETING CO	597.00	17.29%	MENA REAL ESTATE CO	123.00	-5.38%	KUWAIT BUSINESS TC	142.00	57631.03
AL TAMDEEN INVESTMENT CO	750.00	13.81%	COMMERCIAL FACILITIES CO	248.00	-4.98%	KUWAIT PROJECTS H	101.00	31734.60
SPECIALITIES GROUP HOLDING C	136.00	8.80%	DAR AL THURAYA REAL ESTATE C	98.90	-4.90%	OULA FUEL MARKETII	597.00	21512.17
KUWAIT BUSINESS TOWN REAL ES	142.00	7.58%	ARKAN AL KUWAIT REAL ESTATE	103.00	-4.63%	WARBA BANK KSCP	227.00	19068.83
SOOR FUEL MARKETING CO KSC	295.00	7.27%	UNITED PROJECTS FOR AVIATION	167.00	-4.57%	BURGAN BANK	241.00	10996.53

Source: FSC