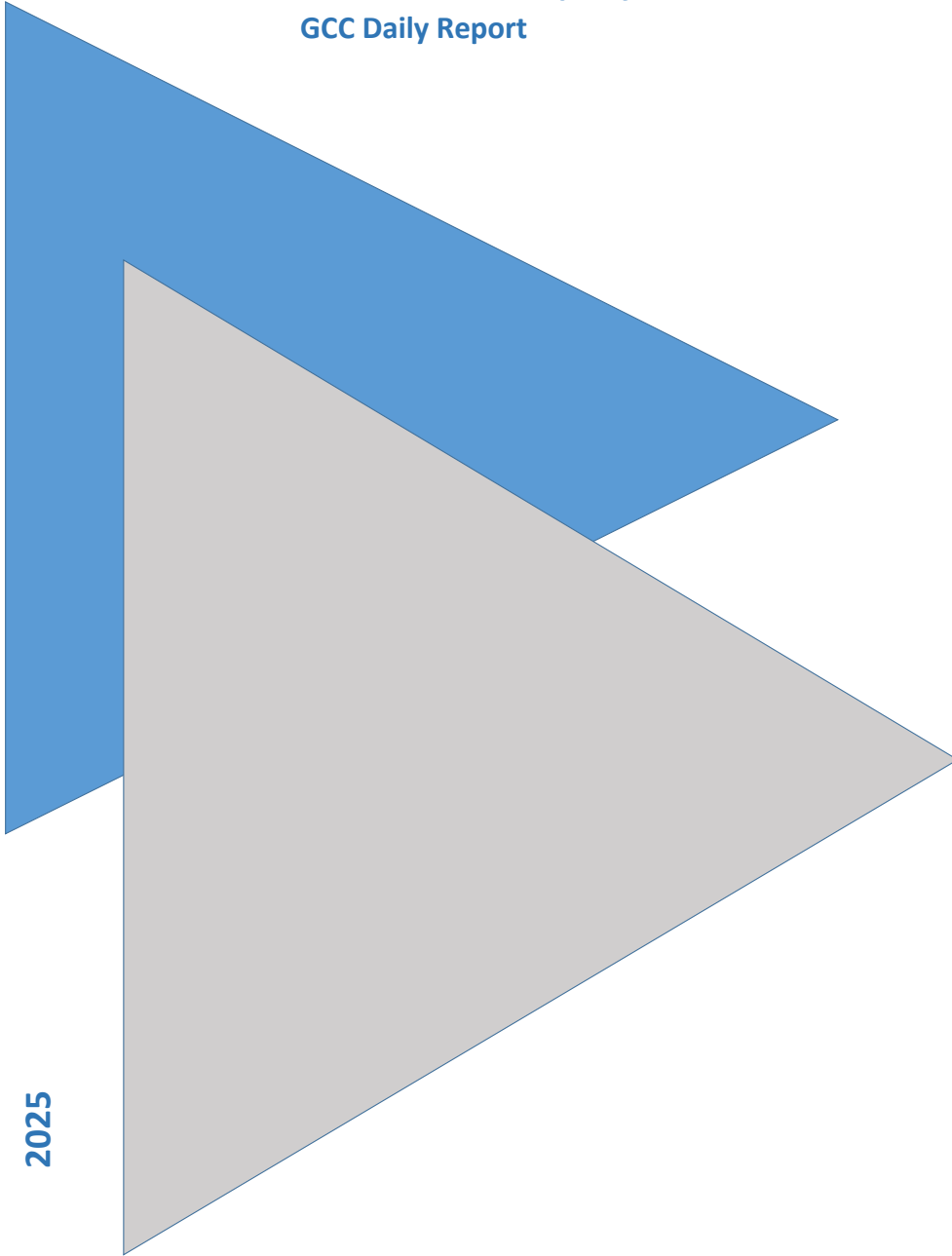


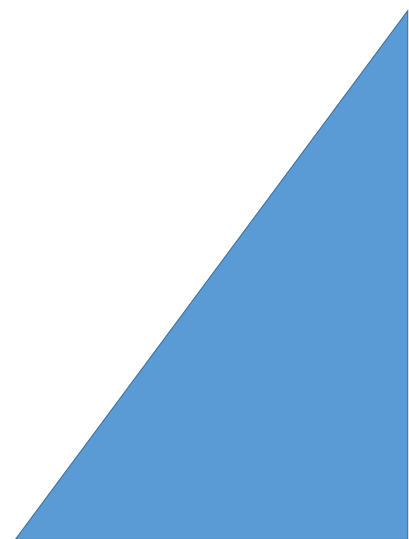
Financial Services Company
GCC Daily Report



2025

Research Department

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FSC Daily Report

25/03/2025



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	3,735.73	1.2	0.8	21.6	21.3	3.5	3.0	1.76%
MSCI Emerging Markets Index	1,136.01	0.4	5.6	15.2	15.1	1.8	1.7	2.68%
MSCI FM FRONTIER MARKETS	573.75	0.7	7.7	-	12.1	1.6	1.6	4.15%

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	583.85	0.2	2.5	10.8	13.9	1.6	1.7	4.20%
Muscat Stock Exchange MSX 30 Index	4,408.33	0.5	(3.7)	9.5	12.5	0.9	0.8	6.23%
Tadawul All Share Index	11,744.12	(0.3)	(2.4)	18.0	22.2	2.3	2.3	3.75%
Dubai Financial Market General Index	5,112.06	(0.1)	(0.9)	9.0	11.3	1.4	1.1	4.81%
FTSE ADX GENERAL INDEX	9,335.69	(0.4)	(0.9)	20.8	21.7	2.5	2.4	2.27%
Qatar Exchange Index	10,157.56	(0.3)	(3.9)	11.2	14.1	1.2	1.5	4.94%
Bahrain Bourse All Share Index	1,957.49	0.3	(1.4)	14.5	11.2	1.3	0.9	9.06%
Boursa Kuwait All Share Price Return Ir	8,084.47	0.8	9.8	13.4	20.9	2.0	1.6	2.92%

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	591.25	0.5	3.8	16.1	17.0	1.8	1.7	2.63%
MSCI AC Asia Ex. Japan Index	738.74	0.5	4.9	15.7	16.8	1.8	1.7	0.00%
Nikkei 225	37,780.54	0.5	(5.3)	19.2	25.5	1.9	1.9	1.85%
S&P/ASX 200	7,942.46	0.1	(2.7)	19.9	19.3	2.2	2.2	3.72%
Hang Seng Index	23,344.25	(2.3)	16.4	12.1	11.0	1.3	1.1	3.72%
NSE Nifty 50 Index	23,668.65	0.0	0.1	22.0	23.9	3.5	3.3	1.36%

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	183.90	(0.2)	8.3	15.4	16.3	2.2	2.0	3.10%
MSCI Emerging Markets Europe Index	140.80	2.2	18.9	10.3	7.2	1.3	1.0	3.53%
FTSE 100 Index	8,676.66	0.4	6.2	13.1	14.1	1.9	1.8	3.61%
Deutsche Boerse AG German Stock Inc	23,006.43	0.7	15.6	16.5	15.5	1.9	1.7	2.44%
CAC 40	8,089.31	0.8	9.6	16.2	16.1	1.9	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	5,720.61	1.8	(1.8)	24.3	23.9	4.7	4.2	1.36%
S&P 500 INDEX	5,767.57	1.8	(1.9)	24.7	23.8	5.0	4.4	1.32%
Dow Jones Industrial Average	42,583.32	1.4	0.1	22.4	21.4	5.5	4.7	1.67%
NASDAQ Composite Index	18,188.59	2.3	(5.8)	34.2	39.1	6.5	6.0	0.73%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	560.02	0.3	1.9	-32%	145%
Gold Spot \$/Oz	3,022.09	0.4	15.1	-1%	188%
BRENT CRUDE FUTR May25	73.47	0.6	-0.6	-13%	58%
Generic 1st'OQA' Future	74.91	0.8	-1.5	-40%	306%
LME COPPER 3MO (\$)	9,956.00	1.0	13.5	-9%	130%
SILVER SPOT \$/OZ	33.29	0.8	15.2	-4%	178%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,408.33							
Change	19.90	0.45%						
Previous Close	4,388.43		Financial Sector	7,733.61	7,653.36	1.05%	-0.08%	0.10%
Open	4,380.74		Industry Sector	5,509.27	5,532.07	-0.41%	-5.54%	4.53%
Day's High	4,408.33		Services Sector	1,600.87	1,610.52	-0.60%	-1.96%	-8.16%
Day's Low	4,380.74							
YTD Change	-3.68%							
Volume Mn	31.76							
MSX30 Value Traded Mn	4.97							
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
MUSCAT GASES	0.090	9.76%	SHELL OMAN MARKETING	0.502	-8.73%	ASYAD SHIPPING	0.124	15755.99
AHLI Bank Bonds24	0.102	8.51%	OMAN CEMENT	0.385	-7.89%	SOHAR INTERNATION	0.134	3780.11
OMAN EMIRATES HO.	0.063	5.00%	AL ANWAR CERAMIC	0.112	-6.67%	OQ GAS NETWORKS	0.133	1958.81
ASAFFA FOODS	0.378	5.00%	OMAN PACKAGING	0.150	-6.25%	ABRAJ ENERGY SERVI	0.232	1278.19
AHLI BANK	0.162	4.52%	AL SHARQIYA INVESTMENT HO.	0.071	-5.33%	OQ EXPLORATION AN	0.314	1135.17

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,744.12		Tadawul Banks	12,842.25	12,917.66	-0.58%	-0.74%	0.35%
Change	-33.96	-0.29%	Tadawul Energy	4,980.79	4,926.97	1.09%	2.00%	-3.14%
Previous Close	11,778.08		Tadawul Utilities	11,522.12	11,586.27	-0.55%	0.26%	-10.51%
Open	11,790.27		Tadawul Telecom	8,708.63	8,693.84	0.17%	0.08%	-2.07%
Day's High	11,798.88		Tadawul Insurance	9,327.88	9,369.22	-0.44%	-1.75%	-7.65%
Day's Low	11,710.73		Tadawul Retailing	7,641.22	7,614.06	0.36%	-0.17%	-3.22%
YTD Change	-2.43%		Tadawul Food & Beverages	5,587.79	5,631.21	-0.77%	-0.77%	-5.74%
Volume Mn	159,154.43		Tadawul Media	21,998.11	21,889.30	0.50%	0.33%	-13.77%
Value Traded Mn	3,886.42		Tadawul Materials	5,169.08	5,199.10	-0.58%	0.14%	-1.11%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	13,457.29	13,740.91	-2.06%	-0.69%	-11.70%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
NATIONAL BUILDING AND MARKET	190	9.32%	MOBI INDUSTRY CO	14.56	-4.84%	AL-BAHA DEVELOPMI	0.36	19206.44
TABUK CEMENT CO	13.08	3.48%	SCIENTIFIC & MEDICAL EQUIPME	41.05	-4.42%	SAUDI ARABIAN OIL (26.25	8190.20
BAWAN CO	49.8	3.21%	ASTRA INDUSTRIAL GROUP	153.20	-4.01%	ELECTRICAL INDUSTR	5.87	3159.92
ABDULLAH SAAD MOHAMMED ABO M	37.7	2.72%	SAVOLA	29.05	-3.97%	BATIC INVESTMENTS	2.54	3098.36
ALJAZIRA TAKAFUL TA'AWUNI CO	14.8	2.64%	ARABIAN PIPES CO	10.18	-3.78%	TOURISM ENTERPRIS	0.80	2669.81

Source: FSC

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,112.06							
Change	-4.39	-0.09%						
Previous Close	5,116.45		Real Estate & Construction	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Open	5,117.22		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	5,133.66		Insurance	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Day's Low	5,105.21		Consumer Staples	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
YTD Change	-0.01		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	111,034.55		Telecommunication	RD/A N/A	RD/A N/A	RD/AL/EI	RD/AL/EI	RD/AL/EI
Value Traded Mn	434.00		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
AMANAT HOLDINGS PJSC	1.13	4.63%	DUBAI REFRESHMENTS COMPANY	20	-9.91%	AIR ARABIA PJSC	3.47	87,156.60
COMMERCIAL BANK OF DUBAI	7.25	2.84%	DUBAI NATIONAL INSURANCE	3.83	-9.88%	GULF NAVIGATION H	5.14	18,452.39
DUBAI FINANCIAL MARKET PJSC	1.33	0.76%	EMIRATES INVESTMENT BANK	72.3	-9.63%	DRAKE & SCULL INTEI	0.35	16,060.47
MASHREQBANK	248	0.61%	GULF NAVIGATION HOLDING PJSC	5.14	-4.99%	DUBAI ELECTRICITY &	2.49	6,190.63
AIR ARABIA PJSC	3.47	0.58%	BHM CAPITAL FINANCIAL SERVIC	1.65	-4.62%	UNION PROPERTIES F	0.56	5,878.58

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,335.69							
Change	-34.14	-0.36%						
Previous Close	9,369.83		Financial	16,774.87	16,825.12	-0.30%	-0.38%	-2.25%
Open	9,369.83		Telecommunication	4,242.47	4,320.36	-1.80%	-1.18%	3.56%
Day's High	9,383.51		Consumer Services	8,992.88	9,065.31	-0.80%	-3.06%	-7.63%
Day's Low	9,334.17		Basic Material	4,416.84	4,401.21	0.36%	1.91%	-8.45%
YTD Change	-0.88%		Industrials	2,501.88	2,482.34	0.79%	0.17%	-3.18%
			Utilities	12,395.79	12,395.79	0.00%	-0.32%	2.63%
Volume Mn	264,166.41		Energy	2,163.24	2,157.93	0.25%	-0.06%	-4.37%
Value Traded Mn	842.63		Health Care	2,098.38	2,123.05	-1.16%	0.31%	-5.86%
Traded / Listed Stocks	73	84	Real Estate	12,515.77	12,660.50	-1.14%	1.47%	-3.91%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
SHARJAH CEMENT & INDUS DEVEL	0.746	14.77%	ABU DHABI SHIP BUILDING CO	5.44	-5.06%	ESHRAQ INVESTMEN	0.39	61881.00
PALMS SPORTS P.J.S.C	6.52	6.89%	ESG EMIRATES STALLIONS GROU	8.22	-4.42%	MULTIPLY GROUP	1.61	35804.25
GHITHA HOLDING PJSC	17.74	3.50%	ABU DHABI COMMERCIAL BANK	10.54	-4.18%	ABU DHABI NATIONA	0.52	13674.01
SUDATEL TELECOM GROUP LTD	0.326	2.52%	MULTIPLY GROUP	1.61	-3.59%	BOROUGE	2.41	10420.30
RAK PROPERTIES	1.28	2.40%	EMSTEEL BUILDING MATERIALS	1.11	-2.63%	ALPHA DHABI HOLDII	11.00	8083.47

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,157.56							
Change	-28.14	-0.28%	Total Return	23,902.45	23,968.65	-0.28%	-1.43%	-1.72%
Previous Close	10185.7		Rayan Islamic	4,839.70	4,858.02	-0.38%	-1.31%	-1.10%
Open	10185.7		All Share	3,726.12	3,736.38	-0.27%	-1.39%	-1.86%
			Banks & Finance	4,543.41	4,536.46	0.15%	-1.36%	-3.06%
Day's High	10224.38		Industrials	4,241.26	4,272.33	-0.73%	-1.87%	-1.93%
Day's Low	10114.22		Transportation	5,605.09	5,633.54	-0.51%	0.16%	3.27%
YTD Change	-0.03911898		Real Estate	1,565.66	1,575.41	-0.62%	-1.56%	-0.33%
			Insurance	2,252.96	2,279.79	-1.18%	-2.27%	-3.36%
Volume Mn	126.701		Telecommunications	1,926.06	1,944.11	-0.93%	-2.46%	-1.68%
Value Traded Mn	313.4682		Consumer Goods	7,777.30	7,835.85	-0.75%	-0.72%	1.41%
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	2.32	3.16%	MEKDAM HOLDING GROUP	2.94	-2.78%	BALADNA	1.17	19702.27
GULF WAREHOUSING COMPANY	3.09	1.41%	QATAR GERMAN CO FOR MEDICAL	1.31	-2.74%	ESTITHMAR HOLDINC	2.32	15119.63
AL RAYAN BANK	2.31	1.01%	VODAFONE QATAR	1.95	-2.50%	AL RAYAN BANK	2.31	11350.25
DOHA BANK QPSC	1.91	0.21%	AL FALEH EDUCATION HOLDING	0.70	-1.83%	EZDAN HOLDING GR	0.98	10240.75
QATAR NATIONAL BANK	15.90	0.19%	QATAR INSURANCE CO	1.87	-1.79%	QATAR ALUMINIUM N	1.28	9746.55

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,957.49							
Change	5.87	0.30%						
Previous Close	1,951.62		MSCI Bahrain	157.93	158.02	-0.06%	-0.68%	-0.24%
Open	1,951.62		MSCI Bahrain Domestic Islamic	61.56	61.92	-0.58%	-1.09%	-1.05%
Day's High	1957.490		MSCI Bahrain Net TR USD	435.21	435.65	-0.10%	-0.10%	0.66%
Day's Low	1942.880							
YTD Change	-1.43%							
Volume Mn	557.16							
Value Traded Mn	0.335							
Traded / Listed Stocks	41	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
ARAB BANKING CORP BSC-\$US	0.36	8.11%	GFH FINANCIAL GROUP BSC	0.31	-1.88%	ALUMINIUM BAHRAII	1.12	435.47
APM TERMINALS BAHRAIN BSC	1.19	1.28%	SOLIDARITY BAHRAIN BSC	0.34	-0.37%	ZAIN BAHRAIN BSCC	0.11	120.00
-	-	-	ALUMINIUM BAHRAIN BSC	1.12	-0.09%	GFH FINANCIAL GRO	0.31	100.33
-	-	-	-	-	-	AL SALAM BANK BSC	0.20	79.95
-	-	-	-	-	-	NATIONAL BANK OF	0.50	53.75

Source: FSC

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Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	8,084.47							
Change	61.14	0.76%	Industrials	744.21	744.43	-0.03%	-2.44%	2.84%
Previous Close	8,023.33		Banks	2,058.56	2,043.28	0.75%	1.46%	13.74%
Open	8,035.30		Consumer Service	975.07	913.40	6.75%	-5.92%	-2.36%
			Technology	1,098.52	1,098.52	0.00%	-31.98%	5.59%
Day's High	8,098.76		Real Estate	1,500.39	1,489.55	0.73%	-3.98%	10.88%
Day's Low	8,035.30		Financial Services	1,501.29	1,491.77	0.64%	-4.30%	-0.61%
YTD Change	9.81%		Telecom	1,037.71	1,028.01	0.94%	-2.92%	1.96%
			Health Care	570.91	570.91	0.00%	9.94%	24.57%
Volume Mn	0.22		Insurance	2,109.88	2,110.41	-0.03%	2.18%	2.66%
Value Traded Mn	74.38		Basic Materials	885.95	884.29	0.19%	-4.93%	-2.78%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
MEZZAN HOLDING CO KSCC	875.00	7.10%	EKTITAB HOLDING CO SAK	12.10	-7.63%	KUWAIT BUSINESS TC	117.00	20916.81
OULA FUEL MARKETING CO	506.00	6.53%	SHUAIBA INDUSTRIAL CO	177.00	-4.84%	KUWAIT REAL ESTATI	334.00	19368.62
KUWAIT & MIDDLE EAST FIN INV	140.00	6.06%	AL MANAR FINANCING & LEASING	65.50	-3.39%	KUWAIT FINANCE HC	799.00	13884.39
BOURSA KUWAIT SECURITIES CO	2837.00	5.39%	AL MADAR KUWAIT HOLDING CO	93.90	-3.20%	ARZAN FINANCIAL GF	294.00	13676.01
PRIVATIZATION HOLDING COMPAN	49.00	5.38%	NATIONAL INDUSTRIES CO KSC	242.00	-2.81%	WARBA BANK KSCP	230.00	12498.82

Source: FSC