

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

20/04/2025



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	3,476.06	0.1	(6.3)	20.3	21.1	3.3	3.1	1.95%
MSCI Emerging Markets Index	1,068.59	0.1	(0.6)	14.5	15.2	1.7	1.7	2.86%
MSCI FM FRONTIER MARKETS	558.39	(0.0)	4.8	5.0	11.8	0.9	1.6	4.58%

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 I	569.49	0.2	0.0	10.5	13.9	1.6	1.7	4.77%
Muscat Stock Exchange MSX 30 Index	4,306.40	0.0	(5.9)	9.5	12.5	0.8	0.8	6.41%
Tadawul All Share Index	11,628.00	0.6	(3.4)	18.0	22.2	2.2	2.4	3.93%
Dubai Financial Market General Index	5,096.93	0.7	(1.2)	9.1	11.3	1.4	1.1	5.68%
FTSE ADX GENERAL INDEX	9,277.65	0.2	(1.5)	20.4	21.8	2.4	2.4	2.40%
Qatar Exchange Index	10,135.24	(0.0)	(4.1)	11.1	14.1	1.2	1.5	4.95%
Bahrain Bourse All Share Index	1,903.22	0.1	(4.2)	14.1	11.2	1.3	0.9	9.71%
Boursa Kuwait All Share Price Return I	7,880.52	0.1	7.0	17.6	21.0	1.8	1.6	3.00%
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 I	557.27	0.1	(2.1)	15.4	17.1	1.8	1.7	2.81%
MSCI AC Asia Ex. Japan Index	688.94	0.2	(2.2)	14.9	16.8	1.7	1.7	0.00%
Nikkei 225	34,730.28	1.0	(12.9)	17.2	25.5	1.8	1.9	2.05%
S&P/ASX 200	7,819.14	0.8	(4.2)	19.6	19.4	2.2	2.2	3.78%
Hang Seng Index	21,395.14	1.6	6.7	10.8	11.0	1.2	1.1	4.07%
NSE Nifty 50 Index	23,851.65	1.8	0.9	22.2	24.0	3.5	3.3	1.30%

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	169.45	0.0	(0.3)	14.2	16.3	2.0	2.0	3.40%
MSCI Emerging Markets Europe Index	138.26	(0.2)	16.8	10.3	7.3	1.3	1.0	3.54%
FTSE 100 Index	8,275.66	0.0	1.3	12.2	14.1	1.9	1.7	3.84%
Deutsche Boerse AG German Stock In	21,205.86	(0.5)	6.5	17.0	15.6	1.8	1.7	2.64%
CAC 40	7,285.86	(0.6)	(1.3)	14.6	16.2	1.8	1.8	3.35%

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	5,249.26	0.0	(9.9)	22.7	24.0	4.4	4.2	1.49%
S&P 500 INDEX	5,282.70	0.1	(10.2)	22.6	23.5	4.5	4.4	1.44%
Dow Jones Industrial Average	39,142.23	(1.3)	(8.0)	20.6	21.4	5.0	4.8	1.82%
NASDAQ Composite Index	16,286.45	(0.1)	(15.7)	30.4	37.6	5.8	6.0	0.81%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	538.5	1.4	-2.0	-35%		136%	
Gold Spot \$/Oz	3,326.9	-0.5	26.8	0%		217%	
BRENT CRUDE FUTR Jun25	68.0	3.2	-7.6	-19%		46%	
Generic 1st'OQA' Future	69.6	3.2	-8.5	-45%		277%	
LME COPPER 3MO (\$)	9,188.5	-0.2	4.8	-16%		112%	
SILVER SPOT \$/OZ	32.6	-0.6	12.6	-7%		172%	

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,306.40							
Change	1.35	0.03%						
Previous Close	4,305.05		Financial Sector	7,578.61	7,574.43	0.06%	-1.46%	-1.91%
Open	4,305.23		Industry Sector	5,712.44	5,708.35	0.07%	2.96%	8.38%
Day's High	4,311.91		Services Sector	1,551.51	1,544.89	0.43%	-3.00%	-10.99%
Day's Low	4,296.65							
YTD Change	-5.90%							
Volume Mn	16.12							
MSX30 Value Traded Mn	2.66							
Traded Securities	56.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
ASAFFA FOODS	0.405	6.58%	DHOFAR INSURANCE	0.200	-9.91%	SOHAR INTERNATIONAL BANK	0.131	4213.7
OMAN EDUCATION & TRAINING INVE	1.060	6.00%	AL MADINA INVESTMENT HOLDING	0.048	-9.43%	OQ BASE INDUSTRIES (SFZ)	0.101	1842.4
OMAN EMIRATES HO.	0.065	3.17%	NATIONAL FINANCE	0.119	-4.03%	OQ EXPLORATION AND PRODUCTIC	0.278	1753.4
AL SUWADI POWER	0.070	2.94%	OMAN FLOUR MILLS	0.400	-3.61%	BANK MUSCAT	0.251	1148.8
OOREDOO	0.172	2.38%	AL SHARQIYA INVESTMENT HO.	0.070	-2.78%	BANK NIZWA	0.099	1095.5

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,628.00							
Change	75.02	0.65%	Tadawul Banks	12,570.14	12,542.04	0.22%	0.22%	-4.82%
Previous Close	11,552.98		Tadawul Energy	4,865.82	4,828.79	0.77%	0.77%	-4.16%
Open	11,574.75		Tadawul Utilities	11,405.06	11,360.74	0.39%	0.39%	-4.54%
Day's High	11,636.32		Tadawul Telecom	9,153.25	9,130.08	0.25%	0.25%	3.31%
Day's Low	11,574.20		Tadawul Insurance	9,219.09	9,179.61	0.43%	0.43%	-3.88%
YTD Change	-3.39%		Tadawul Retailing	7,586.40	7,564.34	0.29%	0.29%	-2.47%
Volume Mn	285,424.16		Tadawul Food & Beverages	5,506.95	5,411.94	1.76%	1.76%	-2.96%
Value Traded Mn	4,725.48		Tadawul Media	21,403.33	21,336.30	0.31%	0.31%	-2.41%
Traded / Listed Stocks	253	228	Tadawul Materials	5,090.97	5,071.97	0.37%	0.37%	-3.39%
			Tadawul Capital Goods	13,995.22	13,790.33	1.49%	1.49%	1.55%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
SAUDI PRINTING & PACKAGING C	11.56	9.89%	AQASEEM FACTORY FOR CHEMICAL	7.60	-3.80%	TOURISM ENTERPRISE CO/ SHAMS	0.85	13409.2
KINGDOM HOLDING CO	9.11	7.95%	AL HASOOB CO	51.00	-3.77%	SAUDI ARABIAN OIL CO	25.65	7531.0
JABAL OMAR DEVELOPMENT CO	25.25	7.14%	RIYADH CEMENT CO	33.90	-2.87%	BATIC INVESTMENTS AND LOGIST	2.42	5423.7
AL-HASSAN G.I. SHAKER CO	30.20	6.70%	CANADIAN MEDICAL CENTER CO	6.13	-2.54%	AL-BAHA DEVELOPMENT & INVEST	3.13	4964.1
SAUDI CABLE CO	130.20	5.68%	LEEJAM SPORTS CO JSC	136.00	-1.45%	JABAL OMAR DEVELOPMENT CO	25.25	4777.9

Note that the KSA data is updated till 3:00 PM Muscat Time

Dubai Financial Market

	Close		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	35.41	0.70%						
Previous Close	5,061.52		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,061.52		Banking	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
			Investment and Financial	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	5,100.67		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,061.52		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	-0.01		Services	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
			Industrial	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Volume Mn	120,488.85		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	253.49		Transportation	#N/A N/A	#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
AMLAH FINANCE	0.849	6.13%	EMIRATES INVESTMENT BANK	85	-2.86%	UNION PROPERTIES PJSC	0.57	41919.49
NATIONAL CEMENT CO	3.64	5.20%	AMANAT HOLDINGS PJSC	1.09	-1.80%	SHUAA CAPITAL PSC	0.24	17812.66
UNION PROPERTIES PJSC	0.57	3.26%	AJMAN BANK PJSC	1.57	-1.26%	DRAKE & SCULL INTERNATIONAL	0.31	15067.66
BHM CAPITAL FINANCIAL SERVIC	1.59	2.58%	DEYAAR DEVELOPMENT PJSC	0.929	-0.11%	DUBAI INVESTMENTS PJSC	2.48	10783.68
GULF NAVIGATION HOLDING PJSC	5.45	2.25%	-	-	-	DUBAI ELECTRICITY & WATER AU	2.62	7034.69

Abu Dhabi Securities Exchange

	Close		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	18.42	0.20%						
Previous Close	9,259.23		Financial	16,783.74	16,747.50	0.22%	0.00%	-0.30%
Open	9,259.23		Telecommunication	4,255.41	4,260.19	-0.11%	0.00%	2.47%
			Consumer Services	8,761.88	8,850.49	-1.00%	0.00%	-2.51%
Day's High	9,277.94		Basic Material	4,746.03	4,756.45	-0.22%	0.00%	6.97%
Day's Low	9,256.15		Industrials	2,451.69	2,443.59	0.33%	0.00%	-2.70%
YTD Change	-1.50%		Utilities	12,514.98	12,514.98	0.00%	0.00%	-10.26%
			Energy	2,074.96	2,065.22	0.47%	0.00%	-3.87%
Volume Mn	186,310.69		Health Care	1,971.87	1,971.48	0.02%	0.00%	-5.57%
Value Traded Mn	599.78		Real Estate	11,958.56	11,806.45	1.29%	0.00%	-3.45%
Traded / Listed Stocks	76	84						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
ARAM GROUP	1.5	4.90%	SHARIAH CEMENT & INDUS DEVEL	0.672	-8.45%	ESHRAQ INVESTMENTS PJSC	0.49	40425.72
PALMS SPORTS P.J.S.C	6.49	3.02%	RESPONSE PLUS HOLDING PJSC	4.06	-5.14%	MULTIPLY GROUP	1.66	23958.58
CHIMERA S&P UAE SHI ETF A	7.99	2.44%	ABU DHABI NATIONAL HOTELS	0.53	-3.81%	BOROUGE	2.59	16469.14
ABU DHABI COMMERCIAL BANK	10.6	2.32%	ALKHALEJ INVESTMENT	3.85	-3.02%	DANA GAS	0.78	10761.42
ESG EMIRATES STALLIONS GROU	7.99	1.65%	GULF PHARMACEUTICAL IND PSC	1.31	-2.96%	ALPHA DHABI HOLDING PJSC	11.04	7902.58

Qatar Stock Exchange

Close	10,135.24		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-0.60	-0.01%	Total Return	23,909.98	23,911.39	-0.01%	-0.01%	-0.95%
Previous Close	10135.84		Rayan Islamic	4,890.79	4,892.57	-0.04%	-0.04%	-0.09%
Open	10135.84		All Share	3,733.38	3,730.35	0.08%	0.08%	-0.67%
			Banks & Finance	4,538.09	4,524.06	0.31%	0.31%	-1.18%
Day's High	10150.6		Industrials	4,179.60	4,193.98	-0.34%	-0.34%	-2.28%
Day's Low	10116.03		Transportation	5,556.94	5,559.96	-0.05%	-0.05%	-1.40%
YTD Change	-0.0412303		Real Estate	1,617.91	1,617.90	0.00%	0.00%	2.76%
			Insurance	2,214.40	2,233.54	-0.86%	-0.86%	-0.19%
Volume Mn	178.927		Telecommunications	2,102.12	2,103.23	-0.05%	-0.05%	7.10%
Value Traded Mn	224.8306		Consumer Goods	7,892.43	7,862.78	0.38%	0.38%	1.15%
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
MAZAYA REAL ESTATE DEVELOPME	0.61	6.43%	QATAR INSURANCE CO	1.82	-1.51%	MAZAYA REAL ESTATE DEVELOPME	0.61	71999.37
MEDICARE GROUP	4.65	4.49%	LESHA BANK LLC	1.33	-1.12%	EZDAN HOLDING GROUP	0.98	16298.25
DLALA HOLDING	1.03	4.46%	AL AHLI BANK	3.55	-0.89%	SALAM INTERNATIONAL INVESTME	0.63	10315.86
INMA HOLDING COMPANY	3.55	4.16%	QATAR EXCHANGE INDEX ETF	10.18	-0.88%	BALADNA	1.19	9427.82
QATAR GENERAL INSURANCE & RE	1.09	2.25%	QATAR ISLAMIC INSURANCE GROU	8.29	-0.81%	ALJARAH HOLDING COMPANY QPS	0.70	8786.25

Bahrain Bourse

Close	1,903.22		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	1.07	0.06%						
Previous Close	1,902.15		MSCI Bahrain	151.49	151.49	0.00%	0.00%	-2.89%
Open	1,902.15							
			MSCI Bahrain Domestic Islamic	58.88	58.88	0.00%	-0.01%	-3.37%
Day's High	1903.420							
Day's Low	1899.610		MSCI Bahrain Net TR USD	430.20	430.19	0.00%	0.00%	-2.17%
YTD Change	-4.16%							
Volume Mn	1,632.60							
Value Traded Mn	0.302							
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
ITHMAAR HOLDING BSC	0.03	21.43%	BMMI BSC	0.42	-6.67%	NATIONAL BANK OF BAHRAIN BSC	0.49	291.85
GULF HOTEL GROUP B.S.C	0.34	9.68%	AL SALAM BANK BSC	0.20	-0.99%	AL SALAM BANK BSC	0.20	269.18
APM TERMINALS BAHRAIN BSC	1.14	5.07%	-	-	-	ITHMAAR HOLDING BSC	0.03	187.50
ZAIN BAHRAIN BSCC	0.12	1.74%	-	-	-	BBK BSC	0.49	109.30
BAHRAIN FLOUR MILLS CO	0.37	1.39%	-	-	-	BAHRAIN FLOUR MILLS CO	0.37	78.26

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,880.52							
Change	11.54	0.15%	Industrials	736.26	731.38	0.67%	-1.18%	1.74%
Previous Close	7,868.98		Banks	1,990.34	1,989.57	0.04%	-2.63%	9.98%
Open	7,883.08		Consumer Service	911.85	899.65	1.36%	-7.62%	-8.69%
			Technology	1,164.00	1,149.45	1.27%	8.11%	11.89%
Day's High	7,901.33		Real Estate	1,517.14	1,513.68	0.23%	0.00%	12.12%
Day's Low	7,865.62		Financial Services	1,475.10	1,470.29	0.33%	-2.21%	-2.35%
YTD Change	7.04%		Telecom	1,028.23	1,029.14	-0.09%	-2.06%	1.03%
			Health Care	574.35	570.28	0.71%	0.66%	25.32%
Volume Mn	0.29		Insurance	1,995.56	1,954.17	2.12%	-6.41%	-2.90%
Value Traded Mn	78.58		Basic Materials	888.67	871.76	1.94%	-1.14%	-2.48%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	KWD	%		KWD	%	Companies	KWD	000
GULF FRANCHISING HOLDING CO	126.00	44.83%	OSOUL INVESTMENT KSCC	132.00	-5.71%	WARBA BANK KSCP	217.00	25580.08
KUWAIT REINSURANCE CO KSC	418.00	20.81%	KUWAIT NATIONAL CINEMA CO	1200.00	-3.85%	MENA REAL ESTATE CO	118.00	19999.04
REAL ESTATE TRADE CENTERS CO	73.90	11.97%	NATIONAL INDUSTRIES CO KSC	216.00	-3.57%	KUWAIT FINANCE HOUSE	715.00	16238.26
ALKOUT INDUSTRIAL PROJECTS C	1032.00	9.90%	GULF INSURANCE GROUP KSC	1050.00	-3.05%	AGILITY	253.00	14739.39
KUWAIT HOTELS SAK	242.00	9.50%	NATIONAL PETROLEUM SERVICES	962.00	-2.83%	KUWAIT BUSINESS TOWN REAL ES	136.00	13617.12

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