

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

21/04/2025



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)	14.6	15.2	1.7	1.7	2.86%
MSCI FM FRONTIER MARKETS	558.39	(0.0)	4.8	-	11.7	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 In	569.67	0.0	0.0	10.5	13.9	1.6	1.7	4.77%
Muscat Stock Exchange MSX 30 Index	4,293.00	(0.3)	(6.2)	9.5	12.5	0.8	0.8	6.43%
Tadawul All Share Index	11,565.44	(0.5)	(3.9)	18.1	22.2	2.2	2.4	3.95%
Dubai Financial Market General Index	5,104.35	0.1	(1.1)	9.1	11.3	1.4	1.1	5.67%
FTSE ADX GENERAL INDEX	9,272.26	(0.1)	(1.6)	20.4	21.8	2.4	2.4	2.40%
Qatar Exchange Index	10,106.72	(0.3)	(4.4)	11.1	14.1	1.2	1.5	4.97%
Bahrain Bourse All Share Index	1,895.11	(0.4)	(4.6)	14.1	11.2	1.3	0.9	9.75%
Boursa Kuwait All Share Price Return Ir	7,873.77	(0.1)	6.9	17.6	21.0	1.8	1.6	3.01%

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	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	34,279.92	(1.3)	(14.1)	17.0	25.5	1.8	1.9	2.08%
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	24,125.55	1.1	2.0	22.2	24.0	3.5	3.3	1.29%

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 Inc	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	538.53	1.4	-2.0	-35%	136%
Gold Spot \$/Oz	3,387.28	1.8	29.1	0%	222%
BRENT CRUDE FUTR Jun25	66.49	-2.2	-9.6	-21%	43%
Generic 1st'OQA' Future	67.78	-2.7	-10.9	-46%	267%
LME COPPER 3MO (\$)	9,188.50	-0.2	4.8	-16%	112%
SILVER SPOT \$/OZ	32.94	1.2	14.0	-6%	175%

Source: FSC

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Muscat Stock Exchange

Close	4,293.00		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-13.40	-0.31%						
Previous Close	4,306.40		Financial Sector	7,532.40	7,578.61	-0.61%	-2.06%	-2.50%
Open	4,307.04		Industry Sector	5,768.06	5,712.44	0.97%	3.97%	9.44%
Day's High	4,307.94		Services Sector	1,545.86	1,551.51	-0.36%	-3.35%	-11.31%
Day's Low	4,289.60							
YTD Change	-6.20%							
Volume Mn	16.19							
MSX30 Value Traded Mn	2.72							
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
NATIONAL ALUMINIUM PRODUCTS	0.063	12.50%	LIVA GROUP	0.260	-3.70%	OQ GAS NETWORKS	0.128	2401.40
JABAL REIF	0.100	9.89%	DHOFAR GENERATING	0.053	-3.64%	SOHAR INTERNATION	0.132	2139.53
SMN POWER HOLDING	0.233	5.91%	ASYAD SHIPPING	0.112	-3.45%	ASYAD SHIPPING	0.112	1747.97
OMAN FLOUR MILLS	0.423	5.75%	OMAN EMIRATES HO.	0.063	-3.08%	OQ EXPLORATION AN	0.278	1731.62
TAKAFUL OMAN	0.048	4.35%	ALANWAR INVESTMENT	0.077	-2.53%	BANK MUSCAT	0.251	1636.36

Saudi Exchange

Close	11,565.44		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-61.16	-0.53%	Tadawul Banks	12,555.62	12,560.23	-0.04%	0.11%	-4.93%
Previous Close	11,626.60		Tadawul Energy	4,827.71	4,874.57	-0.96%	-0.02%	-4.91%
Open	11,633.71		Tadawul Utilities	11,319.73	11,403.80	-0.74%	-0.36%	-5.26%
Day's High	11,642.16		Tadawul Telecom	9,108.58	9,118.60	-0.11%	-0.24%	2.81%
Day's Low	11,560.68		Tadawul Insurance	9,206.09	9,229.83	-0.26%	0.29%	-4.01%
YTD Change	-3.91%		Tadawul Retailing	7,557.00	7,593.81	-0.48%	-0.10%	-2.85%
			Tadawul Food & Beverages	5,477.05	5,524.58	-0.86%	1.20%	-3.48%
Volume Mn	182,985.98		Tadawul Media	21,002.68	21,145.18	-0.67%	-1.56%	-4.23%
Value Traded Mn	4,725.48		Tadawul Materials	5,057.48	5,092.55	-0.69%	-0.29%	-4.03%
Traded / Listed Stocks	253	228	Tadawul Capital Goods	13,865.16	14,052.04	-1.33%	0.54%	0.60%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SAUDI PRINTING & PACKAGING C	12.7	9.86%	MOBI INDUSTRY CO	13.78	-4.97%	TOURISM ENTERPRIS	0.84	13183.86
SAUDI CABLE CO	142.6	5.32%	EASTERN PROVINCE CEMENT CO	34.30	-3.92%	MOBILE TELECOMML	13.10	8852.11
ZAMIL INDUSTRIAL INVESTMENT	38.2	3.38%	DAR AL ARKAN REAL ESTATE DEV	22.72	-3.73%	BATIC INVESTMENTS	2.34	6699.49
RAYDAN FOOD CO	18.9	3.17%	AL KATHIRI HOLDING CO	2.27	-3.40%	SAUDI ARABIAN OIL C	25.45	4570.87
AL HASOOB CO	52.6	3.14%	ASTRA INDUSTRIAL GROUP	148.40	-3.39%	AL-BAHA DEVELOPMI	3.10	3933.54

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,104.35							
Change	7.42	0.15%						
Previous Close	5,096.93		Real Estate & Construction	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
Open	5,098.48		Banking	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
			Investment and Financial	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
Day's High	5,124.96		Insurance	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
Day's Low	5,097.90		Consumer Staples	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
YTD Change	-0.01		Services	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
			Industrial	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
Volume Mn	120,488.85		Telecommunication	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
Value Traded Mn	253.49		Transportation	49,434.00	49,434.00	-0.00%	-0.00%	-0.00%
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
UNITED FOODS CO	13	8.33%	NATIONAL CEMENT CO	3.28	-9.89%	AL FIRDOUS HOLDING	0.29	23,168.39
AL FIRDOUS HOLDINGS PJSC	0.288	5.49%	DUBAI REFRESHMENTS COMPANY	20.3	-6.88%	UNION PROPERTIES F	0.57	21,725.94
ISLAMIC ARAB INSURANCE COM	0.392	2.89%	DUBAI ISLAMIC INSURANCE CO	0.34	-4.76%	SHUAA CAPITAL PSC	0.24	13,285.84
AMLAK FINANCE	0.86	1.30%	TABREED	2.56	-1.54%	DRAKE & SCULL INTEI	0.31	12,276.98
DUBAI ELECTRICITY & WATER AU	2.65	1.15%	AMANAT HOLDINGS PJSC	1.08	-0.92%	DUBAI ELECTRICITY &	2.65	10,892.37

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,272.26							
Change	-5.39	-0.06%						
Previous Close	9,277.65		Financial	16,779.47	16,783.74	-0.03%	-0.03%	-0.33%
Open	9,277.65		Telecommunication	4,293.66	4,255.41	0.90%	0.90%	3.39%
			Consumer Services	8,764.01	8,761.88	0.02%	0.02%	-2.49%
Day's High	9,291.23		Basic Material	4,749.27	4,746.03	0.07%	0.07%	7.04%
Day's Low	9,258.03		Industrials	2,437.27	2,451.69	-0.59%	-0.59%	-3.27%
YTD Change	-1.56%		Utilities	12,514.98	12,514.98	0.00%	0.00%	-10.26%
			Energy	2,066.89	2,074.96	-0.39%	-0.39%	-4.25%
Volume Mn	186,310.69		Health Care	1,944.45	1,971.87	-1.39%	-1.39%	-6.89%
Value Traded Mn	599.78		Real Estate	11,841.02	11,958.56	-0.98%	-0.98%	-4.40%
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
ABU DHABI NATIONAL TAKAFUL C	5.56	6.92%	ARAM GROUP	1.35	-10.00%	ESHRAQ INVESTMEN	0.49	80773.97
ALKHALEJ INVESTMENT	4.1	6.49%	GHITHA HOLDING PJSC	17.54	-4.05%	MULTIPLY GROUP	1.70	29198.44
NATIONAL BANK OF UMM AL QAIW	2.25	4.65%	FUJAIRAH CEMENT INDUSTRIES	0.303	-2.57%	BOROUGE	2.60	14125.02
HAYAH INSURANCE CO PJSC	1.54	3.36%	GULF PHARMACEUTICAL IND PSC	1.28	-2.29%	DANA GAS	0.78	13146.59
MULTIPLY GROUP	1.7	2.41%	NMDC GROUP PJSC	23.14	-2.28%	ABU DHABI NATIONA	0.53	6959.25

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Qatar Stock Exchange

Close	10,106.72		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-28.52	-0.28%	Total Return	23,842.70	23,909.98	-0.28%	-0.29%	-1.23%
Previous Close	10135.24		Rayan Islamic	4,873.47	4,890.79	-0.35%	-0.39%	-0.44%
Open	10135.24		All Share	3,721.98	3,733.38	-0.31%	-0.22%	-0.98%
			Banks & Finance	4,528.43	4,538.09	-0.21%	0.10%	-1.39%
Day's High	10149.97		Industrials	4,154.61	4,179.60	-0.60%	-0.94%	-2.86%
Day's Low	10106.72		Transportation	5,529.18	5,556.94	-0.50%	-0.55%	-1.89%
YTD Change	-0.04392831		Real Estate	1,617.32	1,617.91	-0.04%	-0.04%	2.72%
			Insurance	2,214.56	2,214.40	0.01%	-0.85%	-0.18%
Volume Mn	198.637		Telecommunications	2,085.34	2,102.12	-0.80%	-0.85%	6.25%
Value Traded Mn	414.3084		Consumer Goods	7,910.87	7,892.43	0.23%	0.61%	1.38%
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
WIDAM FOOD CO	2.17	4.58%	QATAR ELECTRICITY & WATER CO	14.52	-2.68%	MAZAYA REAL ESTAT	0.60	31017.76
ESTITHMAR HOLDING QPSC	2.69	2.17%	VODAFONE QATAR	2.13	-2.29%	AL RAYAN BANK	2.19	22667.33
INMA HOLDING COMPANY	3.62	1.80%	DLALA HOLDING	1.01	-1.65%	BALADNA	1.21	21349.68
DOHA BANK QPSC	2.00	1.42%	MAZAYA REAL ESTATE DEVELOPME	0.60	-1.63%	ESTITHMAR HOLDING	2.69	14373.13
QATAR ISLAMIC INSURANCE GROU	8.40	1.39%	QATAR NAVIGATION	10.65	-1.21%	EZDAN HOLDING GRC	0.97	11723.34

Bahrain Bourse

Close	1,895.11		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-8.11	-0.43%	MSCI Bahrain	151.16	151.49	-0.22%	-0.22%	-3.11%
Previous Close	1,903.22		MSCI Bahrain Domestic Islamic	58.71	58.88	-0.28%	-0.28%	-3.64%
Open	1,903.22		MSCI Bahrain Net TR USD	430.20	430.19	0.00%	0.00%	-2.17%
Day's High	1904.810							
Day's Low	1895.110							
YTD Change	-4.57%							
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	0.04	8.82%	ARAB BANKING CORP BSC-\$US	0.34	-5.56%	ITHMAAR HOLDING E	0.04	736.02
AL SALAM BANK BSC	0.20	1.00%	APM TERMINALS BAHRAIN BSC	1.10	-3.95%	BAHRAIN ISLAMIC BA	0.06	423.28
BAHRAIN NATIONAL HOLDING	0.51	0.99%	BAHRAIN DUTY FREE COMPLEX	0.42	-2.33%	ARAB BANKING CORP	0.34	161.10
SEEF PROPERTIES	0.12	0.83%	ALUMINIUM BAHRAIN BSC	1.02	-0.98%	BBK BSC	0.49	102.03
-	-	-	ZAIN BAHRAIN BSCC	0.12	-0.85%	SEEF PROPERTIES	0.12	69.29

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Boursa Kuwait

Close	7,873.77		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-6.75	-0.09%	Industrials	735.50	736.26	-0.10%	-1.28%	1.64%
Previous Close	7,880.52		Banks	1,987.81	1,990.34	-0.13%	-2.75%	9.84%
Open	7,881.66		Consumer Service	912.35	911.85	0.05%	-7.57%	-8.64%
			Technology	1,193.10	1,164.00	2.50%	10.81%	14.69%
Day's High	7,900.58		Real Estate	1,517.53	1,517.14	0.03%	0.03%	12.15%
Day's Low	7,859.05		Financial Services	1,472.68	1,475.10	-0.16%	-2.37%	-2.51%
YTD Change	6.94%		Telecom	1,030.01	1,028.23	0.17%	-1.89%	1.21%
			Health Care	574.35	574.35	0.00%	0.66%	25.32%
Volume Mn	0.45		Insurance	1,946.65	1,995.56	-2.45%	-8.70%	-5.28%
Value Traded Mn	97.95		Basic Materials	907.71	888.67	2.14%	0.98%	-0.39%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
REAL ESTATE TRADE CENTERS CO	117.00	58.32%	KUWAIT & MIDDLE EAST FIN INV	147.00	-5.77%	KUWAIT BUSINESS TC	149.00	46233.91
AL SAFAT INVESTMENT CO	113.00	11.99%	AL-AHLEIA INSURANCE CO SAKP	740.00	-4.39%	REAL ESTATE TRADE I	117.00	39346.11
EQUIPMENT HOLDING CO K.S.C.C	57.50	10.36%	KUWAIT REINSURANCE CO KSC	400.00	-4.31%	ARZAN FINANCIAL GF	267.00	38065.99
AL SAFAT ENERGY HOLDING COMP	55.10	9.76%	JTC LOGISTICS TRANSPORTATION	386.00	-3.98%	AL SAFAT INVESTMEI	113.00	37535.43
KUWAIT BUSINESS TOWN REAL ES	149.00	9.56%	MANAZEL HOLDING	34.30	-3.38%	MENA REAL ESTATE C	117.00	26577.62

Source: FSC