

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

23/04/2025



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	3,487.99	1.9	(5.9)	20.0	21.1	3.3	3.1	1.95%
MSCI Emerging Markets Index	1,073.79	0.2	(0.2)	14.6	15.2	1.8	1.7	2.87%
MSCI FM FRONTIER MARKETS	558.63	(0.1)	4.9	-	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	569.35	(0.0)	(0.0)	10.5	13.9	1.6	1.7	4.78%
Muscat Stock Exchange MSX 30 Index	4,289.79	(0.0)	(6.3)	9.4	12.5	0.8	0.8	6.43%
Tadawul All Share Index	11,665.64	0.7	(3.1)	18.0	22.2	2.2	2.4	3.92%
Dubai Financial Market General Index	5,173.29	0.8	0.3	9.2	11.3	1.4	1.1	5.60%
FTSE ADX GENERAL INDEX	9,310.10	0.6	(1.2)	20.4	21.9	2.4	2.4	2.39%
Qatar Exchange Index	10,237.11	1.0	(3.2)	11.1	14.1	1.2	1.5	4.90%
Bahrain Bourse All Share Index	1,887.53	(0.3)	(5.0)	14.0	11.3	1.3	0.9	9.79%
Boursa Kuwait All Share Price Return Ir	7,896.24	0.6	7.2	18.3	21.0	1.8	1.6	3.04%

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	559.10	(0.0)	(1.8)	15.5	17.1	1.8	1.7	2.83%
MSCI AC Asia Ex. Japan Index	690.92	0.0	(1.9)	15.0	16.8	1.7	1.7	0.00%
Nikkei 225	34,868.63	1.9	(12.6)	17.0	25.5	1.8	1.9	2.05%
S&P/ASX 200	7,920.51	1.3	(2.9)	19.6	19.4	2.2	2.2	3.73%
Hang Seng Index	22,072.62	2.4	10.0	10.9	11.0	1.2	1.1	4.02%
NSE Nifty 50 Index	24,328.95	0.7	2.9	22.5	24.0	3.6	3.3	1.28%

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	169.88	0.3	0.0	14.2	16.3	2.0	2.0	3.40%
MSCI Emerging Markets Europe Index	141.79	1.5	19.8	10.4	7.3	1.3	1.0	3.46%
FTSE 100 Index	8,436.81	1.3	3.2	12.3	14.1	1.9	1.7	3.77%
Deutsche Boerse AG German Stock Inc	21,852.37	2.6	9.8	17.1	15.6	1.8	1.7	2.61%
CAC 40	7,489.18	2.2	1.5	14.7	16.2	1.8	1.8	3.20%

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	5,256.84	2.5	(9.8)	22.2	24.0	4.3	4.2	1.49%
S&P 500 INDEX	5,287.76	2.5	(10.1)	22.6	23.5	4.5	4.4	1.44%
Dow Jones Industrial Average	39,186.98	2.7	(7.9)	20.6	21.4	5.0	4.8	1.82%
NASDAQ Composite Index	16,300.42	2.7	(15.6)	30.4	37.6	5.9	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	538.18	1.2	-2.1	-35%	136%
Gold Spot \$/Oz	3,330.67	-1.5	26.9	-3%	217%
BRENT CRUDE FUTR Jun25	68.31	1.3	-7.1	-19%	47%
Generic 1st'OQA' Future	69.95	1.5	-8.0	-44%	279%
LME COPPER 3MO (\$)	9,369.00	2.0	6.9	-14%	116%
SILVER SPOT \$/OZ	32.91	1.2	13.9	-6%	175%

Source: FSC

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Muscat Stock Exchange

Close	4,289.79		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-1.12	-0.03%						
Previous Close	4,290.91		Financial Sector	7,528.40	7,546.83	-0.24%	-2.11%	-2.56%
Open	4,290.91		Industry Sector	5,777.60	5,723.25	0.95%	4.14%	9.62%
Day's High	4,293.04		Services Sector	1,544.21	1,542.31	0.12%	-3.46%	-11.41%
Day's Low	4,277.40							
YTD Change	-6.27%							
Volume Mn	11.82							
MSX30 Value Traded Mn	2.14							
Traded Securities	48							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
SHELL OMAN MARKETING	0.572	7.92%	JABAL REIF	0.100	-2.91%	OMAN ARAB BANK	0.133	2165.21
JAZEERA STEEL PRODUCTS	0.370	7.25%	ASYAD SHIPPING	0.106	-1.85%	ABRAJ ENERGY SERVI	0.228	1729.53
SEMBICORP SALALAH	0.096	3.23%	UNITED FINANCE	0.056	-1.75%	OQ EXPLORATION AN	0.277	1521.44
PHOENIX POWER	0.060	1.69%	OMAN ARAB BANK	0.133	-1.48%	BANK NIZWA	0.099	977.73
ALANWAR INVESTMENT	0.079	1.28%	AL SUWADI POWER	0.069	-1.43%	OQ BASE INDUSTRIES	0.100	903.00

Saudi Exchange

Close	11,665.64		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	79.24	0.68%	Tadawul Banks	12,745.79	12,701.46	0.35%	1.62%	-3.49%
Previous Close	11,586.40		Tadawul Energy	4,892.76	4,855.48	0.77%	1.32%	-3.63%
Open	11,667.62		Tadawul Utilities	11,492.64	11,178.95	2.81%	1.16%	-3.81%
Day's High	11,714.41		Tadawul Telecom	9,149.99	9,112.70	0.41%	0.22%	3.28%
Day's Low	11,656.56		Tadawul Insurance	9,145.91	9,083.79	0.68%	-0.37%	-4.64%
YTD Change	-3.08%		Tadawul Retailing	7,534.98	7,530.43	0.06%	-0.39%	-3.13%
			Tadawul Food & Beverages	5,475.19	5,449.13	0.48%	1.17%	-3.52%
Volume Mn	222,127.62		Tadawul Media	20,795.29	20,430.77	1.78%	-2.54%	-5.18%
Value Traded Mn	5,412.41		Tadawul Materials	5,060.84	5,023.25	0.75%	-0.22%	-3.97%
Traded / Listed Stocks	253	228	Tadawul Capital Goods	13,666.89	13,622.63	0.32%	-0.90%	-0.83%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
AL-BAHA DEVELOPMENT & INVEST	3.31	9.97%	ALWASAIL INDUSTRIAL CO	3.20	-3.61%	TOURISM ENTERPRIS	0.86	24595.85
NATIONAL BUILDING AND MARKET	198	9.88%	ETIHAD ETISALAT CO	61.00	-3.17%	AL-BAHA DEVELOPMI	3.31	18614.16
CHUBB ARABIA COOPERATIVE INS	43.6	6.86%	SAUDI PRINTING & PACKAGING C	12.88	-2.42%	SAUDI ARABIAN OIL C	25.75	7401.28
HERFY FOOD SERVICES CO	24.78	6.81%	DALLAH HEALTHCARE CO	125.60	-1.88%	SAUDI INDUSTRIAL E	2.49	6837.44
ANAAM INTERNATIONAL HOLDING	17.6	5.26%	BAWAN CO	54.90	-1.61%	BATIC INVESTMENTS	2.34	6832.52

Source: FSC

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,173.29							
Change	38.89	0.76%						
Previous Close	5,134.40		Real Estate & Construction	10,134.40	10,134.40	0.00%	0.00%	0.00%
Open	5,132.85		Banking	10,132.85	10,132.85	0.00%	0.00%	0.00%
			Investment and Financial	10,132.85	10,132.85	0.00%	0.00%	0.00%
Day's High	5,176.95		Insurance	10,176.95	10,176.95	0.00%	0.00%	0.00%
Day's Low	5,132.07		Consumer Staples	10,132.07	10,132.07	0.00%	0.00%	0.00%
YTD Change	0.00		Services	10,132.07	10,132.07	0.00%	0.00%	0.00%
			Industrial	10,132.07	10,132.07	0.00%	0.00%	0.00%
Volume Mn	108,806.73		Telecommunication	10,132.07	10,132.07	0.00%	0.00%	0.00%
Value Traded Mn	395.63		Transportation	10,132.07	10,132.07	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 GENERAL INSURANCE	6.65	-9.89%	SHUAA CAPITAL PSC	0.26	51,052.87
SHUAA CAPITAL PSC	0.256	4.92%	AMANAT HOLDINGS PJSC	1.06	-1.85%	DRAKE & SCULL INTEI	0.32	14,096.06
DUBAI ISLAMIC INSURANCE CO	0.353	3.82%	DUBAI REFRESHMENTS COMPANY	20	-1.48%	DUBAI ELECTRICITY &	2.69	13,557.08
EMAAR DEVELOPMENT PJSC	12.2	2.95%	GULF NAVIGATION HOLDING PJSC	5.45	-0.91%	UNION PROPERTIES F	0.57	13,476.56
EMAAR PROPERTIES PJSC	12.7	2.83%	DUBAI NATIONAL INSURANCE	3.73	-0.80%	EMAAR PROPERTIES I	12.70	8,840.23

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,310.10							
Change	53.48	0.58%						
Previous Close	9,256.62		Financial	16,867.49	16,764.75	0.61%	0.50%	0.19%
Open	9,256.62		Telecommunication	4,262.99	4,294.36	-0.73%	0.18%	2.65%
			Consumer Services	8,848.61	8,750.94	1.12%	0.99%	-1.55%
Day's High	9,312.23		Basic Material	4,740.83	4,701.12	0.84%	-0.11%	6.85%
Day's Low	9,256.62		Industrials	2,446.99	2,426.45	0.85%	-0.19%	-2.89%
YTD Change	-1.16%		Utilities	12,475.25	12,594.44	-0.95%	-0.32%	-10.54%
			Energy	2,076.52	2,068.30	0.40%	0.08%	-3.80%
Volume Mn	265,498.87		Health Care	2,005.13	1,940.13	3.35%	1.69%	-3.98%
Value Traded Mn	979.03		Real Estate	11,921.69	11,646.33	2.36%	-0.31%	-3.74%
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
MULTIPLY GROUP	1.87	5.65%	EMIRATES INSURANCE CO. (PSC)	6.66	-10.00%	MULTIPLY GROUP	1.87	63082.30
SHARJAH CEMENT & INDUS DEVEL	0.699	4.64%	ABU DHABI NATIONAL TAKAFUL C	5.01	-9.89%	ESHRAQ INVESTMEN'	0.48	31928.79
HAYAH INSURANCE CO PJSC	1.6	4.58%	PALMS SPORTS P.J.S.C	6	-3.85%	DANA GAS	0.78	15170.57
GULF CEMENT CO	0.73	4.14%	SUDATEL TELECOM GROUP LTD	0.318	-1.85%	ALDAR PROPERTIES P	8.07	11440.91
ABU DHABI COMMERCIAL BANK	10.96	3.79%	ESHRAQ INVESTMENTS PJSC	0.48	-1.84%	ADNOC DRILLING CO	4.85	9858.00

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Qatar Stock Exchange

Close	10,237.11		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	97.82	0.96%	Total Return	24,150.30	23,919.55	0.96%	1.00%	0.04%
Previous Close	10139.29		Rayan Islamic	4,940.62	4,889.05	1.05%	0.98%	0.93%
Open	10139.29		All Share	3,771.06	3,735.44	0.95%	1.09%	0.33%
			Banks & Finance	4,590.86	4,550.51	0.89%	1.48%	-0.03%
Day's High	10237.11		Industrials	4,181.99	4,159.07	0.55%	-0.29%	-2.22%
Day's Low	10139.29		Transportation	5,609.01	5,524.34	1.53%	0.88%	-0.47%
YTD Change	-0.03159367		Real Estate	1,650.98	1,624.52	1.63%	2.04%	4.86%
			Insurance	2,263.82	2,221.23	1.92%	1.36%	2.04%
Volume Mn	267.4		Telecommunications	2,143.42	2,100.41	2.05%	1.91%	9.21%
Value Traded Mn	524.5618		Consumer Goods	7,964.58	7,943.30	0.27%	1.29%	2.07%
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 CINEMA & FILM DISTRIB	2.68	9.22%	GULF WAREHOUSING COMPANY	2.98	-1.36%	QATAR ALUMINUM A	1.25	42913.18
MANNAI CORPORATION QPSC	3.51	3.84%	ZAD HOLDING CO	14.30	-0.69%	BALADNA	1.23	35502.70
VODAFONE QATAR	2.28	3.41%	AL AHLI BANK	3.60	-0.39%	ESTITHMAR HOLDING	2.75	24821.74
QATAR NAVIGATION	10.98	2.81%	BALADNA	1.23	-0.33%	MAZAYA REAL ESTAT	0.61	18829.99
QATAR INSURANCE CO	1.87	2.63%	QATAR & OMAN INVESTMENT CO	0.63	-0.32%	UNITED DEVELOPMEI	1.08	18308.45

Bahrain Bourse

Close	1,887.53		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-4.96	-0.26%	MSCI Bahrain	150.88	151.17	-0.20%	-0.41%	-3.28%
Previous Close	1,892.49		MSCI Bahrain Domestic Islamic	58.58	58.72	-0.25%	-0.51%	-3.86%
Open	1,892.14		MSCI Bahrain Net TR USD	428.54	429.30	-0.18%	-0.38%	-2.54%
Day's High	1895.020							
Day's Low	1881.600							
YTD Change	-4.95%							
Volume Mn	2,877.15							
Value Traded Mn	0.383							
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
BAHRAIN ISLAMIC BANK	0.07	10.00%	ITHMAAR HOLDING BSC	0.04	-2.56%	ITHMAAR HOLDING E	0.04	666.21
BAHRAIN NATIONAL HOLDING	0.52	1.96%	APM TERMINALS BAHRAIN BSC	1.07	-1.39%	AL SALAM BANK BSC	0.20	413.13
GFH FINANCIAL GROUP BSC	0.29	0.34%	ALUMINIUM BAHRAIN BSC	0.99	-1.00%	GFH FINANCIAL GROU	0.29	304.00
-	-	-	ZAIN BAHRAIN BSCC	0.12	-0.85%	BAHRAIN ISLAMIC BA	0.07	236.10
-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.49	-0.41%	ALUMINIUM BAHRAII	0.99	204.67

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Boursa Kuwait

Close	7,896.24		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	45.79	0.58%	Industrials	754.30	743.55	1.45%	1.24%	4.24%
Previous Close	7,850.45		Banks	1,980.56	1,971.44	0.46%	-3.11%	9.43%
Open	7,876.84		Consumer Service	930.83	914.74	1.76%	-5.69%	-6.79%
			Technology	1,185.82	1,193.10	-0.61%	10.13%	13.99%
Day's High	7,908.35		Real Estate	1,538.13	1,525.07	0.86%	1.39%	13.67%
Day's Low	7,876.84		Financial Services	1,489.20	1,479.43	0.66%	-1.27%	-1.41%
YTD Change	7.25%		Telecom	1,042.16	1,032.04	0.98%	-0.73%	2.40%
			Health Care	562.46	574.35	-2.07%	-1.42%	22.73%
Volume Mn	0.58		Insurance	1,933.10	1,930.79	0.12%	-9.34%	-5.94%
Value Traded Mn	122.79		Basic Materials	916.41	918.25	-0.20%	1.95%	0.57%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
GULF FRANCHISING HOLDING CO	138.00	20.00%	AJIAL REAL ESTATE ENTMT	285.00	-5.00%	KUWAIT INTERNATIO	223.00	49832.66
DAR AL THURAYA REAL ESTATE C	117.00	19.51%	ADVANCED TECHNOLOGY CO	722.00	-5.00%	KUWAIT BUSINESS TC	168.00	46206.84
REAL ESTATE TRADE CENTERS CO	290.00	16.00%	KFIC INVEST KSCP	154.00	-4.94%	AL SAFAT INVESTMEP	113.00	41429.88
ENERGY HOUSE HOLDING CO KSCP	251.00	11.06%	ALKOUT INDUSTRIAL PROJECTS C	1000.00	-4.49%	NATIONAL CLEANING	56.00	31792.48
NATIONAL CLEANING COMPANY	56.00	10.67%	NATIONAL INDUSTRIES CO KSC	192.00	-4.00%	MANAZEL HOLDING	37.10	22679.91

Source: FSC