

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

27/04/2025



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	3,618.48	0.6	(2.4)	21.0	21.2	3.4	3.1	1.88%
MSCI Emerging Markets Index	1,097.10	0.4	2.0	14.9	15.2	1.8	1.7	2.82%
MSCI FM FRONTIER MARKETS	565.79	0.5	6.2	5.0	11.7	0.9	1.6	4.53%

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	578.89	(0.2)	1.7	10.7	13.9	1.6	1.7	4.70%
Muscat Stock Exchange MSX 30 Index	4,279.21	0.1	(6.5)	9.4	12.5	0.8	0.8	6.45%
Tadawul All Share Index	11,768.47	0.0	(2.2)	18.3	22.2	2.2	2.4	3.88%
Dubai Financial Market General Index	5,162.61	(0.6)	0.1	9.3	11.3	1.4	1.1	5.74%
FTSE ADX GENERAL INDEX	9,391.83	(0.4)	(0.3)	20.7	21.9	2.5	2.4	2.42%
Qatar Exchange Index	10,269.49	0.1	(2.9)	11.2	14.1	1.2	1.5	4.89%
Bahrain Bourse All Share Index	1,901.14	(0.0)	(4.3)	14.1	11.3	1.3	0.9	9.72%
Boursa Kuwait All Share Price Return I	7,914.97	(0.2)	7.5	17.7	21.0	1.8	1.6	3.03%
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	570.65	0.3	0.2	15.8	17.1	1.8	1.7	2.77%
MSCI AC Asia Ex. Japan Index	705.32	0.4	0.2	15.2	16.8	1.7	1.7	0.00%
Nikkei 225	35,705.74	1.9	(10.5)	17.7	25.5	1.8	1.9	2.03%
S&P/ASX 200	7,968.23	0.6	(2.3)	20.0	19.4	2.2	2.2	3.71%
Hang Seng Index	21,980.74	0.3	9.6	11.1	11.0	1.2	1.1	4.04%
NSE Nifty 50 Index	24,039.35	(0.9)	1.7	22.5	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	174.17	0.4	2.5	14.5	16.3	2.0	2.0	3.33%
MSCI Emerging Markets Europe Index	145.21	(0.2)	22.7	10.8	7.3	1.3	1.0	3.37%
FTSE 100 Index	8,415.25	0.1	3.0	12.4	14.1	1.9	1.8	3.78%
Deutsche Boerse AG German Stock In	22,242.45	0.8	11.7	17.9	15.6	1.9	1.7	2.56%
CAC 40	7,536.26	0.4	2.1	15.1	16.2	1.8	1.8	3.25%

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	5,490.37	0.7	(5.8)	23.6	24.0	4.5	4.2	1.43%
S&P 500 INDEX	5,525.21	0.7	(6.1)	23.6	23.5	4.7	4.4	1.38%
Dow Jones Industrial Average	40,113.50	0.1	(5.7)	21.1	21.4	5.2	4.8	1.78%
NASDAQ Composite Index	17,382.94	1.3	(10.0)	32.5	37.6	6.2	6.0	0.76%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	537.2	0.1	-2.3	-35%		135%	
Gold Spot \$/Oz	3,319.7	-0.9	26.5	-3%		216%	
BRENT CRUDE FUTR Jun25	66.9	0.5	-9.1	-20%		44%	
Generic 1st'OQA' Future	68.2	0.1	-10.3	-46%		270%	
LME COPPER 3MO (\$)	9,374.0	-0.2	6.9	-14%		116%	
SILVER SPOT \$/OZ	33.1	-1.4	14.6	-5%		176%	

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,279.21							
Change	5.77	0.13%						
Previous Close	4,273.44		Financial Sector	7,518.93	7,502.49	0.22%	-2.23%	-2.68%
Open	4,273.44		Industry Sector	5,758.63	5,711.31	0.83%	3.80%	9.26%
Day's High	4,279.21		Services Sector	1,532.89	1,533.94	-0.07%	-4.16%	-12.06%
Day's Low	4,255.65							
YTD Change	-6.50%							
Volume Mn	60.69							
MSX30 Value Traded Mn	9.10							
Traded Securities	54.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
ALMAHA CERAMICS	0.182	9.64%	BARKA WATER AND POWER	0.270	-10.00%	SOHAR INTERNATIONAL BANK	0.130	32765.8
AL ANWAR CERAMIC	0.139	9.45%	VOLTAMP ENERGY	0.631	-5.11%	OQ GAS NETWORKS	0.128	13328.3
ALJAZEERA SERVICES	0.158	6.76%	AL MADINA INVESTMENT HOLDING	0.046	-4.17%	OQ BASE INDUSTRIES (SFZ)	0.102	4211.3
MUSCAT GASES	0.085	4.94%	GULF INTERNATIONAL CHEMICALS	0.065	-2.99%	BANK MUSCAT	0.253	1894.3
SMN POWER HOLDING	0.229	4.09%	ASYAD SHIPPING	0.104	-2.80%	ABRAJ ENERGY SERVICES	0.230	1435.5

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,768.47							
Change	4.08	0.03%	Tadawul Banks	12,807.87	12,809.21	-0.01%	-0.01%	-3.02%
Previous Close	11,764.39		Tadawul Energy	4,886.36	4,894.24	-0.16%	-0.16%	-3.76%
Open	11,790.35		Tadawul Utilities	11,451.50	11,504.37	-0.46%	-0.46%	-4.15%
Day's High	11,800.71		Tadawul Telecom	9,306.18	9,327.07	-0.22%	-0.22%	5.04%
Day's Low	11,749.97		Tadawul Insurance	9,264.84	9,216.11	0.53%	0.53%	-3.40%
YTD Change	-2.23%		Tadawul Retailing	7,565.20	7,565.32	0.00%	0.00%	-2.75%
			Tadawul Food & Beverages	5,497.09	5,532.62	-0.64%	-0.64%	-3.13%
			Tadawul Media	21,257.74	21,167.52	0.43%	0.43%	-3.07%
Volume Mn	394,136.35		Tadawul Materials	5,221.55	5,198.80	0.44%	0.44%	-0.92%
Value Traded Mn	6,951.80		Tadawul Capital Goods	13,861.92	13,682.30	1.31%	1.31%	0.58%
Traded / Listed Stocks	253	228						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
AL-BAHA DEVELOPMENT & INVEST	3.87	9.94%	SAUDI PARTS CENTER CO	49.00	-5.77%	TOURISM ENTERPRISE CO/ SHAMS	0.88	45764.7
ANAAM INTERNATIONAL HOLDING	18.72	9.22%	MOBILE TELECOMMUNICATIONS CO	12.52	-3.85%	AL-BAHA DEVELOPMENT & INVEST	3.87	39184.0
SAUDI RE FOR COOPERATIVE REI	47.10	7.66%	ALWASAIL INDUSTRIAL CO	3.03	-3.81%	ELECTRICAL INDUSTRIES CO	7.30	17214.1
TABUK AGRICULTURAL DEVELOPME	12.82	5.95%	ARABIAN INTERNET & COMMUNICA	300.00	-3.66%	BATIC INVESTMENTS AND LOGIST	2.39	12059.2
DEVELOPMENT WORKS FOOD CO	122.00	4.63%	ARABIAN INTERNATIONAL HEALTH	32.25	-3.30%	MOBILE TELECOMMUNICATIONS C	12.52	6412.6

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,162.61							
Change	-33.21	-0.64%						
Previous Close	5,195.82		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,196.60		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	5,214.67		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,156.36		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.00		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	98,819.40		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	396.21		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
AMANAT HOLDINGS PJSC	1.08	2.86%	EMIRATES INVESTMENT BANK	76	-9.52%	UNION PROPERTIES PJSC	0.58	14151.39
UNION PROPERTIES PJSC	0.578	2.66%	NATIONAL GENERAL INSURANCE	6.64	-7.52%	DUBAI ELECTRICITY & WATER AU	2.66	13222.12
EMAAR PROPERTIES PJSC	12.95	1.97%	NATIONAL CEMENT CO	3.29	-6.80%	DEYAAR DEVELOPMENT PJSC	0.90	11780.15
AL FIRDOUS HOLDINGS PJSC	0.28	1.45%	AL MAL CAPITAL REIT	0.97	-6.73%	DUBAI INVESTMENTS PJSC	2.29	8657.33
AMLAK FINANCE	0.857	1.42%	DUBAI INVESTMENTS PJSC	2.29	-6.53%	EMAAR PROPERTIES PJSC	12.95	8396.36

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,391.83							
Change	-33.10	-0.35%						
Previous Close	9,424.93		Financial	17,042.83	17,117.62	-0.44%	0.00%	1.24%
Open	9,424.93		Telecommunication	4,228.23	4,226.14	0.05%	0.00%	1.81%
			Consumer Services	8,969.81	9,032.89	-0.70%	0.00%	-0.20%
Day's High	9,446.29		Basic Material	4,708.30	4,692.67	0.33%	0.00%	6.11%
Day's Low	9,391.83		Industrials	2,454.68	2,451.87	0.11%	0.00%	-2.58%
YTD Change	-0.29%		Utilities	12,554.71	12,713.63	-1.25%	0.00%	-9.97%
			Energy	2,093.86	2,087.24	0.32%	0.00%	-3.00%
Volume Mn	448,467.19		Health Care	2,114.32	2,061.93	2.54%	0.00%	1.25%
Value Traded Mn	1,347.15		Real Estate	12,074.51	12,297.65	-1.81%	0.00%	-2.51%
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	11.11%	ALKHALEEJ INVESTMENT	3.69	-10.00%	MULTIPLY GROUP	2.11	77926.43
ABU DHABI NATL CO FOR BUILDI	0.815	6.82%	ABU DHABI NATIONAL TAKAFUL C	4.51	-9.98%	ABU DHABI NATIONAL HOTELS	0.52	47826.40
HAYAH INSURANCE CO PJSC	1.6	5.96%	DANA GAS	0.733	-6.03%	ESHRAQ INVESTMENTS PJSC	0.47	41235.55
GHITHA HOLDING PJSC	18.72	4.82%	RAS AL KHAIMAH WHITE CEMENT	1.09	-5.22%	DANA GAS	0.73	14954.23
MULTIPLY GROUP	2.11	3.43%	ESG EMIRATES STALLIONS GROU	7.74	-3.49%	MANAZEL REAL ESTATE PJSC	0.34	13193.76

Qatar Stock Exchange

Close	10,269.49		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	9.32	0.09%	Total Return	24,226.68	24,204.70	0.09%	0.09%	0.36%
Previous Close	10260.17		Rayan Islamic	4,956.59	4,957.51	-0.02%	-0.02%	1.25%
Open	10260.17		All Share	3,779.51	3,780.05	-0.01%	-0.01%	0.55%
			Banks & Finance	4,608.57	4,621.23	-0.27%	-0.27%	0.35%
Day's High	10300.86		Industrials	4,198.93	4,138.38	1.46%	1.46%	-1.82%
Day's Low	10248.09		Transportation	5,577.00	5,588.22	-0.20%	-0.20%	-1.04%
YTD Change	-0.0285306		Real Estate	1,627.60	1,652.91	-1.53%	-1.53%	3.37%
			Insurance	2,275.53	2,279.48	-0.17%	-0.17%	2.57%
Volume Mn	149.654		Telecommunications	2,152.68	2,176.23	-1.08%	-1.08%	9.68%
Value Traded Mn	316.2662		Consumer Goods	7,963.12	7,992.95	-0.37%	-0.37%	2.05%
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
MESAIEED PETROCHEMICAL HOLDI	1.44	3.37%	BARWA REAL ESTATE CO	2.76	-1.99%	MESAIEED PETROCHEMICAL HOLDI	1.44	23538.47
GULF INTERNATIONAL SERVICES	3.06	2.07%	UNITED DEVELOPMENT CO	1.04	-1.79%	BALADNA	1.25	23509.46
QATAR GENERAL INSURANCE & RE	1.08	1.99%	QLM LIFE & MEDICAL INSURANCE	1.93	-1.63%	EZDAN HOLDING GROUP	1.01	15661.05
ALIJARAH HOLDING COMPANY QPS	0.75	1.92%	QATAR INTERNATIONAL ISLAMIC	10.46	-1.32%	MAZAYA REAL ESTATE DEVELOPME	0.61	7489.80
INDUSTRIES QATAR	12.37	1.81%	ESTITHMAR HOLDING QPSC	2.72	-1.27%	AL RAYAN BANK	2.20	6454.66

Bahrain Bourse

Close	1,901.14		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-0.36	-0.02%						
Previous Close	1,901.50		MSCI Bahrain	151.37	151.37	0.00%	0.00%	-2.97%
Open	1,901.50		MSCI Bahrain Domestic Islamic	58.82	58.82	0.00%	0.00%	-3.46%
Day's High	1905.500		MSCI Bahrain Net TR USD	429.86	429.86	0.00%	0.00%	-2.24%
Day's Low	1900.280							
YTD Change	-4.27%							
Volume Mn	2,085.07							
Value Traded Mn	0.460							
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
APM TERMINALS BAHRAIN BSC	1.08	1.42%	ALUMINIUM BAHRAIN BSC	1.01	-0.50%	ITHMAAR HOLDING BSC	0.04	510.00
ZAIN BAHRAIN BSCC	0.12	0.86%	AL SALAM BANK BSC	0.20	-0.49%	ZAIN BAHRAIN BSCC	0.12	170.00
BBK BSC	0.49	0.41%	-	-	-	ALUMINIUM BAHRAIN BSC	1.01	103.47
-	-	-	-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.49	80.10
-	-	-	-	-	-	AL SALAM BANK BSC	0.20	52.02

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	7,914.97							
Change	-17.56	-0.22%	Industrials	742.85	763.27	-2.68%	-0.30%	2.65%
Previous Close	7,932.53		Banks	1,990.39	1,986.83	0.18%	-2.63%	9.98%
Open	7,933.66		Consumer Service	1,049.34	994.19	5.55%	6.31%	5.07%
			Technology	1,164.00	1,185.82	-1.84%	8.11%	11.89%
Day's High	7,952.90		Real Estate	1,552.48	1,544.13	0.54%	2.33%	14.73%
Day's Low	7,913.53		Financial Services	1,459.21	1,494.57	-2.37%	-3.26%	-3.40%
YTD Change	7.50%		Telecom	1,049.05	1,051.68	-0.25%	-0.08%	3.08%
			Health Care	562.46	562.46	0.00%	-1.42%	22.73%
Volume Mn	0.43		Insurance	1,934.38	1,947.29	-0.66%	-9.28%	-5.88%
Value Traded Mn	101.47		Basic Materials	918.64	918.47	0.02%	2.20%	0.81%
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
METAL & RECYCLING CO	210.00	20.69%	GULF INVESTMENT HOUSE KSC	550.00	-36.71%	KUWAIT BUSINESS TOWN REAL ES	164.00	68857.74
REAL ESTATE TRADE CENTERS CO	285.00	10.89%	HUMANSOFT HOLDING CO KSC	2359.00	-13.75%	KUWAIT INTERNATIONAL BANK	227.00	27997.84
NATIONAL PETROLEUM SERVICES	1068.00	6.80%	CREDIT RATING & COLLECTION	46.90	-6.57%	AL SAFAT INVESTMENT CO	120.00	21785.59
EKTITAB HOLDING CO SAK	14.90	6.43%	AJIAL REAL ESTATE ENTMT	280.00	-6.04%	ARZAN FINANCIAL GROUP FOR FI	286.00	21227.33
MEZZAN HOLDING CO KSCC	952.00	5.90%	NATIONAL INDUSTRIES CO KSC	190.00	-5.00%	ALIMTIAZ INVESTMENT GROUP	46.10	18756.56

Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24825600 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net
Financial Services (FSC) - Ruwi, Sultanate of Oman - Building no. 1480 - Way no. 3518
Tel: +968 24817205 - Fax: +968 24817205 - Email: research@fscoman.net - Website: www.fscoman.net

Disclaimer

This report prepared by Financial Services Co. SAOG (FSC), and provided for information purposes only. Under no circumstances is to be used or considered as an offer to sell or solicitation of any offer to buy. While all reasonable care has been taken to ensure that the information contained therein is not untrue or misleading at the time of publication, we make no representation as to its accuracy or completeness and it should not be relied upon as such, and the FSC accepts no responsibility whatsoever for any direct or indirect consequential loss arising from any use of this report or its contents. All opinions and estimates included in this document constitute FSC judgment as of the date of production of this report, and are subject to change without notice. This report may not be reproduced, distributed or published by any recipient for any purpose.