

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

28/04/2025



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)	21.1	21.2	3.4	3.1	1.88%
MSCI Emerging Markets Index	1,097.10	0.4	2.0	15.0	15.2	1.8	1.7	2.82%
MSCI FM FRONTIER MARKETS	565.79	0.5	6.2	-	11.7	1.0	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 In	578.79	(0.0)	1.6	10.7	13.9	1.6	1.7	4.70%
Muscat Stock Exchange MSX 30 Index	4,292.01	0.3	(6.2)	9.4	12.5	0.8	0.8	6.43%
Tadawul All Share Index	11,760.67	0.0	(2.3)	18.3	22.2	2.2	2.4	3.89%
Dubai Financial Market General Index	5,216.47	1.0	1.1	9.3	11.3	1.4	1.1	5.68%
FTSE ADX GENERAL INDEX	9,467.67	0.8	0.5	20.7	21.9	2.5	2.4	2.40%
Qatar Exchange Index	10,304.15	0.3	(2.5)	11.3	14.1	1.2	1.5	4.87%
Bahrain Bourse All Share Index	1,892.26	(0.5)	(4.7)	14.0	11.3	1.3	1.0	9.77%
Boursa Kuwait All Share Price Return Ir	7,901.22	(0.2)	7.3	17.7	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	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	15.3	16.8	1.7	1.7	0.00%
Nikkei 225	35,839.99	0.4	(10.2)	17.7	25.5	1.8	1.9	2.02%
S&P/ASX 200	7,997.06	0.4	(2.0)	20.0	19.4	2.2	2.2	3.69%
Hang Seng Index	21,971.96	(0.0)	9.5	11.1	11.0	1.2	1.1	4.04%
NSE Nifty 50 Index	24,328.50	1.2	2.9	22.5	24.0	3.5	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	174.17	0.4	2.5	14.6	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	8,420.86	0.1	3.0	12.4	14.1	1.9	1.8	3.78%
Deutsche Boerse AG German Stock Inc	22,322.37	0.4	12.1	18.0	15.6	1.9	1.7	2.56%
CAC 40	7,579.82	0.6	2.7	15.2	16.2	1.8	1.8	3.23%

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)	23.7	24.0	4.6	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	21.5	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	537.21	0.1	-2.3	-35%	135%
Gold Spot \$/Oz	3,291.86	-0.8	25.4	-4%	213%
BRENT CRUDE FUTR Jun25	66.56	-0.5	-9.5	-21%	43%
Generic 1st'OQA' Future	67.34	-1.3	-11.5	-46%	265%
LME COPPER 3MO (\$)	9,374.00	-0.2	6.9	-14%	116%
SILVER SPOT \$/OZ	33.07	-0.1	14.4	-5%	176%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,292.01							
Change	12.80	0.30%						
Previous Close	4,279.21		Financial Sector	7,561.66	7,518.93	0.57%	-1.68%	-2.13%
Open	4,282.99		Industry Sector	5,879.53	5,758.63	2.10%	5.98%	11.55%
Day's High	4,299.53		Services Sector	1,532.82	1,532.89	0.00%	-4.17%	-12.06%
Day's Low	4,281.50							
YTD Change	-6.22%							
Volume Mn	39.66							
MSX30 Value Traded Mn	5.63							
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	0.072	20.00%	SMN POWER HOLDING	0.216	-5.68%	SOHAR INTERNATION	0.132	9158.76
ALMAHA CERAMICS	0.200	9.89%	ASAFFA FOODS	0.379	-5.25%	AL ANWAR CERAMIC	0.152	5479.44
AL ANWAR CERAMIC	0.152	9.35%	AL MADINA INVESTMENT HOLDING	0.044	-4.35%	OMAN ARAB BANK	0.140	4170.67
OMAN FLOUR MILLS	0.460	5.26%	BARKA WATER AND POWER	0.260	-3.70%	OQ BASE INDUSTRIES	0.103	3850.42
OMAN ARAB BANK	0.140	5.26%	OMAN EMIRATES HO.	0.063	-3.08%	ALJAZEERA SERVICES	0.165	3139.75

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,760.67							
Change	4.46	0.04%	Tadawul Banks	12,771.12	12,770.80	0.00%	-0.30%	-3.30%
Previous Close	11,756.21		Tadawul Energy	4,888.38	4,895.99	-0.16%	-0.12%	-3.72%
Open	11,769.96		Tadawul Utilities	11,391.80	11,436.58	-0.39%	-0.98%	-4.65%
Day's High	11,796.17		Tadawul Telecom	9,300.34	9,269.03	0.34%	-0.29%	4.97%
Day's Low	11,738.30		Tadawul Insurance	9,321.49	9,290.82	0.33%	1.14%	-2.81%
YTD Change	-2.29%		Tadawul Retailing	7,577.20	7,583.97	-0.09%	0.16%	-2.59%
			Tadawul Food & Beverages	5,503.53	5,520.31	-0.30%	-0.53%	-3.02%
Volume Mn	295,299.26		Tadawul Media	21,323.69	21,270.92	0.25%	0.74%	-2.77%
Value Traded Mn	6,951.80		Tadawul Materials	5,188.71	5,213.65	-0.48%	-0.19%	-1.54%
Traded / Listed Stocks	253	228	Tadawul Capital Goods	14,202.51	13,888.31	2.26%	3.80%	3.05%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
AL BASTAIN POWER & TELECOMMU	47.95	7.63%	NATIONAL BUILDING AND MARKET	185.00	-6.57%	AL-BAHA DEVELOPMI	4.08	68526.73
SAUDI RE FOR COOPERATIVE REI	51	6.14%	ALLIED COOPERATIVE INSURANCE	14.34	-4.78%	TOURISM ENTERPRIS	0.88	31838.17
AL-BAHA DEVELOPMENT & INVEST	4.08	5.43%	ARABIAN INTERNET & COMMUNICA	287.40	-4.20%	BATIC INVESTMENTS	2.34	14472.38
ZAMIL INDUSTRIAL INVESTMENT	39.95	4.58%	OBEIKAN GLASS COMPANY	30.85	-4.04%	SAUDI INDUSTRIAL E	2.46	9110.13
ARABIAN FOOD & DAIRY FACTORI	74.9	4.03%	CANADIAN MEDICAL CENTER CO	6.08	-3.49%	MOBILE TELECOMML	12.70	8919.20

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,216.47							
Change	53.86	1.04%						
Previous Close	5,162.61		Real Estate & Construction	49,432.40	49,432.40	0.00%	0.00%	0.00%
Open	5,165.70		Banking	49,432.40	49,432.40	0.00%	0.00%	0.00%
			Investment and Financial	49,432.40	49,432.40	0.00%	0.00%	0.00%
Day's High	5,216.47		Insurance	49,432.40	49,432.40	0.00%	0.00%	0.00%
Day's Low	5,165.70		Consumer Staples	49,432.40	49,432.40	0.00%	0.00%	0.00%
YTD Change	0.01		Services	49,432.40	49,432.40	0.00%	0.00%	0.00%
			Industrial	49,432.40	49,432.40	0.00%	0.00%	0.00%
Volume Mn	98,819.40		Telecommunication	49,432.40	49,432.40	0.00%	0.00%	0.00%
Value Traded Mn	396.21		Transportation	49,432.40	49,432.40	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
DUBAI REFRESHMENTS COMPANY	22.1	10.22%	NATIONAL GENERAL INSURANCE	6.03	-9.19%	DRAKE & SCULL INTEI	0.32	73,651.54
EMIRATES INVESTMENT BANK	78.9	3.82%	DUBAI ISLAMIC INSURANCE CO	0.31	-3.13%	DUBAI ELECTRICITY &	2.67	14,266.08
TABREED	2.64	3.53%	AL SALAM BANK SUDAN	0.667	-2.49%	UNION PROPERTIES F	0.57	12,031.49
EMIRATES INTEGRATED TELECOMM	8.86	3.50%	ARAMEX PJSC	2.75	-2.14%	DEYAAR DEVELOPME	0.91	10,292.54
EMAAR DEVELOPMENT PJSC	12.75	2.82%	ISLAMIC ARAB INSURANCE COM	0.394	-1.50%	SHUAA CAPITAL PSC	0.25	8,743.69

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,467.67							
Change	75.84	0.81%						
Previous Close	9,391.83		Financial	17,193.83	17,042.83	0.89%	0.89%	2.13%
Open	9,391.83		Telecommunication	4,256.22	4,228.23	0.66%	0.66%	2.48%
			Consumer Services	9,066.62	8,969.81	1.08%	1.08%	0.88%
Day's High	9,475.81		Basic Material	4,662.12	4,708.30	-0.98%	-0.98%	5.07%
Day's Low	9,391.83		Industrials	2,502.74	2,454.68	1.96%	1.96%	-0.67%
YTD Change	0.52%		Utilities	12,435.52	12,554.71	-0.95%	-0.95%	-10.83%
			Energy	2,096.09	2,093.86	0.11%	0.11%	-2.90%
Volume Mn	448,467.19		Health Care	2,069.88	2,114.32	-2.10%	-2.10%	-0.88%
Value Traded Mn	1,347.15		Real Estate	12,231.45	12,074.51	1.30%	1.30%	-1.24%
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
HAYAH INSURANCE CO PJSC	1.68	5.00%	GHITHA HOLDING PJSC	17.6	-5.98%	MANAZEL REAL ESTA'	0.36	98871.15
MANAZEL REAL ESTATE PJSC	0.36	4.96%	GULF PHARMACEUTICAL IND PSC	1.38	-3.50%	MULTIPLY GROUP	2.18	77770.24
ABU DHABI SHIP BUILDING CO	6.23	4.88%	ESHRAQ INVESTMENTS PJSC	0.458	-2.35%	ESHRAQ INVESTMEN'	0.46	57459.12
AGTHIA GROUP PJSC	4.63	4.75%	BANK OF SHARJAH	0.924	-1.70%	BOROUGE	2.54	24865.01
ESG EMIRATES STALLIONS GROU	8.1	4.65%	APEX INVESTMENT CO PSC	4.05	-1.22%	ADNOC DRILLING CO	4.87	8886.96

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Qatar Stock Exchange

Close	10,304.15		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	34.66	0.34%	Total Return	24,308.45	24,226.68	0.34%	0.43%	0.70%
Previous Close	10269.49		Rayan Islamic	4,965.55	4,956.59	0.18%	0.16%	1.44%
Open	10269.49		All Share	3,793.47	3,779.51	0.37%	0.36%	0.93%
			Banks & Finance	4,611.27	4,608.57	0.06%	-0.22%	0.41%
Day's High	10306.83		Industrials	4,233.75	4,198.93	0.83%	2.30%	-1.01%
Day's Low	10260.43		Transportation	5,638.19	5,577.00	1.10%	0.89%	0.04%
YTD Change	-0.02525184		Real Estate	1,632.71	1,627.60	0.31%	-1.22%	3.70%
			Insurance	2,291.23	2,275.53	0.69%	0.52%	3.28%
Volume Mn	185.223		Telecommunications	2,170.92	2,152.68	0.85%	-0.24%	10.61%
Value Traded Mn	394.2759		Consumer Goods	7,959.01	7,963.12	-0.05%	-0.42%	2.00%
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 GENERAL INSURANCE & RE	1.11	3.53%	QATAR INTERNATIONAL ISLAMIC	10.34	-1.15%	EZDAN HOLDING GR	1.01	18825.67
QATAR GERMAN CO FOR MEDICAL	1.38	2.90%	QATAR ISLAMIC BANK	20.35	-0.68%	ESTITHMAR HOLDIN	2.75	18541.58
QATAR GAS TRANSPORT(NAKILAT)	4.68	1.96%	AAMAL CO	0.84	-0.59%	BALADNA	1.25	15711.36
INDUSTRIES QATAR	12.53	1.29%	MESAIEED PETROCHEMICAL HOLDI	1.43	-0.56%	QATAR GERMAN CO I	1.38	15618.82
ESTITHMAR HOLDING QPSC	2.75	1.29%	WIDAM FOOD CO	2.16	-0.55%	QATAR ALUMINIUM A	1.27	13517.04

Bahrain Bourse

Close	1,892.26		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-8.88	-0.47%	MSCI Bahrain	151.35	151.37	-0.01%	-0.01%	-2.98%
Previous Close	1,901.14		MSCI Bahrain Domestic Islamic	58.75	58.82	-0.12%	-0.13%	-3.58%
Open	1,901.14		MSCI Bahrain Net TR USD	429.86	429.86	0.00%	0.00%	-2.24%
Day's High	1901.140							
Day's Low	1892.260							
YTD Change	-4.72%							
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
BAHRAIN KUWAIT INSURANCE	0.35	2.99%	ALUMINIUM BAHRAIN BSC	0.99	-1.99%	NATIONAL BANK OF I	0.49	589.19
AL SALAM BANK BSC	0.20	0.50%	GFH FINANCIAL GROUP BSC	0.29	-1.37%	AL SALAM BANK BSC	0.20	250.97
APM TERMINALS BAHRAIN BSC	1.08	0.47%	NATIONAL BANK OF BAHRAIN BSC	0.49	-0.61%	ALUMINIUM BAHRAI	0.99	132.30
-	-	-	-	-	-	GFH FINANCIAL GRO	0.29	100.00
-	-	-	-	-	-	ZAIN BAHRAIN BSCC	0.12	50.00

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Boursa Kuwait

Close	7,901.22		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-13.75	-0.17%	Industrials	734.69	742.85	-1.10%	-1.39%	1.53%
Previous Close	7,914.97		Banks	1,983.60	1,990.39	-0.34%	-2.96%	9.60%
Open	7,918.04		Consumer Service	1,031.18	1,049.34	-1.73%	4.47%	3.25%
			Technology	1,171.27	1,164.00	0.62%	8.78%	12.59%
Day's High	7,932.13		Real Estate	1,565.96	1,552.48	0.87%	3.22%	15.73%
Day's Low	7,876.55		Financial Services	1,469.32	1,459.21	0.69%	-2.59%	-2.73%
YTD Change	7.32%		Telecom	1,053.61	1,049.05	0.43%	0.36%	3.53%
			Health Care	562.46	562.46	0.00%	-1.42%	22.73%
Volume Mn	0.46		Insurance	1,907.17	1,934.38	-1.41%	-10.55%	-7.20%
Value Traded Mn	107.80		Basic Materials	912.26	918.64	-0.69%	1.49%	0.11%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
NATIONAL CONSUMER HOLDING CO	109.00	11.79%	KUWAIT HOTELS SAK	180.00	-13.04%	KUWAIT BUSINESS TC	156.00	48385.04
UNICAP INVESTMENT AND FINANC	267.00	11.25%	EKTTITAB HOLDING CO SAK	13.50	-9.40%	NATIONAL CONSUME	109.00	35429.28
UNITED REAL ESTATE COMPANY	226.00	10.78%	REAL ESTATE TRADE CENTERS CO	259.00	-9.12%	AL SAFAT INVESTME	123.00	30054.66
KUWAIT & MIDDLE EAST FIN INV	165.00	7.84%	EQUIPMENT HOLDING CO K.S.C.C	57.00	-6.56%	NATIONAL INDUSTRII	247.00	24168.56
AL-AHLEIA INSURANCE CO SAKP	800.00	6.10%	KUWAIT FINANCIAL CENTRE SAK	140.00	-6.04%	ALIMTIAZ INVESTME	45.40	20025.04

Source: FSC