

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

29/04/2025



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	3,628.48	0.3	(2.1)	21.1	21.2	3.4	3.1	1.88%
MSCI Emerging Markets Index	1,102.57	0.5	2.5	15.0	15.2	1.8	1.7	2.80%
MSCI FM FRONTIER MARKETS	564.94	(0.2)	6.1	-	11.7	1.0	1.6	4.54%

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	582.78	0.7	2.3	10.8	13.9	1.6	1.7	4.67%
Muscat Stock Exchange MSX 30 Index	4,297.82	0.1	(6.1)	9.4	12.5	0.8	0.8	6.42%
Tadawul All Share Index	11,763.74	(0.2)	(2.3)	18.3	22.2	2.3	2.4	3.83%
Dubai Financial Market General Index	5,241.30	0.5	1.6	9.4	11.4	1.5	1.1	5.65%
FTSE ADX GENERAL INDEX	9,527.50	0.6	1.2	21.0	21.9	2.5	2.4	2.39%
Qatar Exchange Index	10,325.29	0.2	(2.3)	11.3	14.1	1.3	1.5	4.86%
Bahrain Bourse All Share Index	1,902.67	0.5	(4.2)	14.1	11.3	1.3	1.0	10.06%
Boursa Kuwait All Share Price Return Ir	7,917.92	0.2	7.5	17.7	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 Ir	573.78	0.5	0.8	15.9	17.1	1.8	1.7	2.76%
MSCI AC Asia Ex. Japan Index	708.79	0.5	0.7	15.3	16.8	1.7	1.7	0.00%
Nikkei 225	35,839.99	0.4	(10.2)	17.8	25.5	1.9	1.9	2.03%
S&P/ASX 200	8,070.59	0.9	(1.1)	20.2	19.4	2.3	2.2	3.66%
Hang Seng Index	22,008.11	0.2	9.7	11.1	11.0	1.2	1.1	4.02%
NSE Nifty 50 Index	24,335.95	0.0	2.9	22.7	24.0	3.6	3.3	1.27%

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	175.02	0.5	3.0	14.6	16.3	2.0	2.0	3.32%
MSCI Emerging Markets Europe Index	144.95	(0.2)	22.4	10.8	7.3	1.3	1.0	3.34%
FTSE 100 Index	8,434.00	0.2	3.2	12.4	14.1	1.9	1.8	3.77%
Deutsche Boerse AG German Stock Inc	22,390.79	0.5	12.5	17.9	15.6	1.9	1.7	2.55%
CAC 40	7,549.03	(0.3)	2.3	15.2	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	5,495.52	0.1	(5.7)	23.7	24.0	4.6	4.2	1.43%
S&P 500 INDEX	5,528.75	0.1	(6.0)	23.7	23.5	4.8	4.4	1.38%
Dow Jones Industrial Average	40,227.59	0.3	(5.4)	21.2	21.5	5.2	4.8	1.78%
NASDAQ Composite Index	17,366.13	(0.1)	(10.1)	32.4	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	535.35	-0.3	-2.6	-35%	135%
Gold Spot \$/Oz	3,310.90	-1.0	26.2	-3%	215%
BRENT CRUDE FUTR Jun25	64.75	-1.7	-12.0	-23%	39%
Generic 1st'OQA' Future	65.30	-3.0	-14.1	-48%	254%
LME COPPER 3MO (\$)	9,378.00	0.0	7.0	-14%	117%
SILVER SPOT \$/OZ	33.24	0.2	15.0	-5%	177%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,297.82							
Change	5.81	0.14%						
Previous Close	4,292.01		Financial Sector	7,584.39	7,561.66	0.30%	-1.38%	-1.83%
Open	4,291.78		Industry Sector	5,935.45	5,879.53	0.95%	6.98%	12.61%
Day's High	4,298.08		Services Sector	1,533.62	1,532.82	0.05%	-4.12%	-12.02%
Day's Low	4,284.68							
YTD Change	-6.09%							
Volume Mn	27.14							
MSX30 Value Traded Mn	4.39							
Traded Securities	47							

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	0.092	27.78%	TAKAFUL OMAN	0.046	-4.17%	OMAN ARAB BANK	0.145	4135.37
OMAN FLOUR MILLS	0.477	3.70%	MUSANDAM POWER	0.250	-3.10%	OQ BASE INDUSTRIES	0.104	3876.45
OMAN ARAB BANK	0.145	3.57%	ALANWAR INVESTMENT	0.078	-2.50%	OQ GAS NETWORKS	0.129	3839.32
GALFAR ENGINEERING & CONTRACTIN	0.070	2.94%	OMINVEST	0.210	-2.33%	BANK MUSCAT	0.255	3753.77
ASYAD SHIPPING	0.108	2.86%	ALIAZEERA SERVICES	0.162	-1.82%	SOHAR INTERNATION	0.132	2390.07

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,763.74							
Change	-20.89	-0.18%	Tadawul Banks	12,752.50	12,806.54	-0.42%	-0.44%	-3.44%
Previous Close	11,784.63		Tadawul Energy	4,869.15	4,889.25	-0.41%	-0.51%	-4.10%
Open	11,792.48		Tadawul Utilities	11,331.85	11,427.52	-0.84%	-1.50%	-5.16%
Day's High	11,809.40		Tadawul Telecom	9,260.63	9,294.75	-0.37%	-0.71%	4.52%
Day's Low	11,753.80		Tadawul Insurance	9,360.86	9,365.45	-0.05%	1.57%	-2.40%
YTD Change	-2.27%		Tadawul Retailing	7,627.51	7,583.72	0.58%	0.82%	-1.95%
			Tadawul Food & Beverages	5,516.63	5,529.61	-0.23%	-0.29%	-2.79%
Volume Mn	379,601.50		Tadawul Media	22,354.73	21,466.22	4.14%	5.61%	1.93%
Value Traded Mn	6,486.89		Tadawul Materials	5,217.64	5,190.11	0.53%	0.36%	-0.99%
Traded / Listed Stocks	253	228	Tadawul Capital Goods	14,224.08	14,192.07	0.23%	3.96%	3.21%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
ARABIAN CONTRACTING SERVICES	131.2	9.88%	ENMA AL-RAWABI COMPANY	25.70	-4.81%	AL-BAHA DEVELOPMI	4.27	52215.56
AL-BAHA DEVELOPMENT & INVEST	4.27	5.43%	ALWASAIL INDUSTRIAL CO	3.00	-2.91%	BATIC INVESTMENTS	2.37	14802.23
SAUDI ARABIAN MINING CO	49.85	3.85%	SAUDI TADAWUL GROUP HOLDING	186.00	-2.41%	SAUDI ARABIAN MINI	49.85	13543.52
NATIONAL CO FOR LEARNING & E	161.4	3.73%	CANADIAN MEDICAL CENTER CO	6.15	-2.38%	TOURISM ENTERPRIS	0.88	12900.33
ETIHAD ATHEEB TELECOMMUNICAT	100.6	3.70%	SAUDI KAYAN PETROCHEMICAL CO	5.87	-2.17%	ALINMA BANK	29.30	8009.17

Source: FSC

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,241.30							
Change	24.83	0.48%						
Previous Close	5,216.47		Real Estate & Construction	49,434.00	49,434.00	0.00%	0.00%	0.00%
Open	5,218.02		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	5,248.16		Insurance	49,434.00	49,434.00	0.00%	0.00%	0.00%
Day's Low	5,217.70		Consumer Staples	49,434.00	49,434.00	0.00%	0.00%	0.00%
YTD Change	0.02		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	110,711.48		Telecommunication	49,434.00	49,434.00	0.00%	0.00%	0.00%
Value Traded Mn	446.81		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
NATIONAL GENERAL INSURANCE	6.75	11.94%	DUBAI ISLAMIC INSURANCE CO	0.303	-2.26%	DRAKE & SCULL INTEI	0.32	33,140.38
NATIONAL CEMENT CO	3.49	5.76%	EMIRATES INTEGRATED TELECOMM	8.7	-1.81%	DUBAI ELECTRICITY &	2.69	11,807.88
ISLAMIC ARAB INSURANCE COM	0.403	2.28%	SHUAA CAPITAL PSC	0.245	-1.61%	EMAAR PROPERTIES I	13.20	10,432.36
AIR ARABIA PJSC	3.41	2.10%	AMLAK FINANCE	0.836	-1.53%	SHUAA CAPITAL PSC	0.25	9,125.74
AL SALAM BANK SUDAN	0.68	1.95%	EMIRATES INVESTMENT BANK	78	-1.14%	DUBAI ISLAMIC BANK	7.50	9,106.85

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,527.50							
Change	59.83	0.63%						
Previous Close	9,467.67		Financial	17,313.25	17,193.83	0.69%	1.59%	2.84%
Open	9,467.67		Telecommunication	4,291.08	4,256.22	0.82%	1.49%	3.32%
			Consumer Services	9,127.83	9,066.62	0.68%	1.76%	1.56%
Day's High	9,555.36		Basic Material	4,692.67	4,662.12	0.66%	-0.33%	5.76%
Day's Low	9,467.67		Industrials	2,496.82	2,502.74	-0.24%	1.72%	-0.91%
YTD Change	1.15%		Utilities	12,554.71	12,435.52	0.96%	0.00%	-9.97%
			Energy	2,100.58	2,096.09	0.21%	0.32%	-2.69%
Volume Mn	441,522.44		Health Care	2,054.74	2,069.88	-0.73%	-2.82%	-1.60%
Value Traded Mn	1,484.86		Real Estate	12,359.31	12,231.45	1.05%	2.36%	-0.21%
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	5.18	14.86%	ARAM GROUP	1.36	-9.33%	MULTIPLY GROUP	2.11	72910.21
EMIRATES INSURANCE CO, (PSC)	7.4	11.11%	NMDC GROUP PJSC	23.86	-3.40%	RAK PROPERTIES	1.28	26787.81
NATIONAL CORP TOURISM & HOTE	2.44	6.09%	MULTIPLY GROUP	2.11	-3.21%	MANAZEL REAL ESTA'	0.35	24046.49
NATIONAL BANK OF UMM AL QAIW	2.28	5.56%	ABU DHABI NATL CO FOR BUILDI	0.79	-2.47%	BOROUGE	2.57	19680.83
ABU DHABI COMMERCIAL BANK	11.9	4.57%	MANAZEL REAL ESTATE PJSC	0.353	-1.94%	DANA GAS	0.75	18225.95

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Qatar Stock Exchange

Close	10,325.29		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	21.14	0.21%	Total Return	24,358.34	24,308.45	0.21%	0.63%	0.90%
Previous Close	10304.15		Rayan Islamic	4,982.86	4,965.55	0.35%	0.51%	1.79%
Open	10304.15		All Share	3,803.73	3,793.47	0.27%	0.63%	1.20%
			Banks & Finance	4,659.46	4,611.27	1.05%	0.83%	1.46%
Day's High	10363.29		Industrials	4,208.45	4,233.75	-0.60%	1.69%	-1.60%
Day's Low	10304.15		Transportation	5,558.41	5,638.19	-1.41%	-0.53%	-1.37%
YTD Change	-0.02325208		Real Estate	1,616.87	1,632.71	-0.97%	-2.18%	2.69%
			Insurance	2,304.04	2,291.23	0.56%	1.08%	3.85%
Volume Mn	196.605		Telecommunications	2,180.21	2,170.92	0.43%	0.18%	11.08%
Value Traded Mn	470.0724		Consumer Goods	7,914.97	7,959.01	-0.55%	-0.98%	1.44%
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 NATIONAL CEMENT CO	3.50	3.92%	ALIJARAH HOLDING COMPANY QPS	0.73	-2.79%	BALADNA	1.22	32979.75
VODAFONE QATAR	2.38	3.39%	QATAR GAS TRANSPORT(NAKILAT)	4.58	-2.01%	AL RAYAN BANK	2.23	22639.90
QATAR ISLAMIC BANK	20.80	2.21%	BALADNA	1.22	-1.85%	QATAR ALUMINUM N	1.28	12325.51
QLM LIFE & MEDICAL INSURANCE	1.98	1.90%	QATAR GERMAN CO FOR MEDICAL	1.36	-1.73%	ALIJARAH HOLDING C	0.73	11234.07
LESNA BANK LLC	1.37	1.49%	BARWA REAL ESTATE CO	2.73	-1.44%	QATAR GAS TRANSPC	4.58	10335.17

Bahrain Bourse

Close	1,902.67		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	10.41	0.55%	MSCI Bahrain	150.65	151.35	-0.46%	-0.47%	-3.43%
Previous Close	1,892.26		MSCI Bahrain Domestic Islamic	58.41	58.75	-0.58%	-0.70%	-4.14%
Open	1,892.26		MSCI Bahrain Net TR USD	427.82	429.86	-0.48%	-0.48%	-2.71%
Day's High	1902.670							
Day's Low	1892.260							
YTD Change	-4.19%							
Volume Mn	1,247.10							
Value Traded Mn	0.564							
Traded / Listed Stocks	40	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
BAHRAIN CAR PARKS CO AMAKIN	0.15	9.85%	ESTERAD INVESTMENT CO B.S.C.	0.24	-4.00%	AL SALAM BANK BSC	0.21	870.21
BAHRAIN KUWAIT INSURANCE	0.36	2.90%	APM TERMINALS BAHRAIN BSC	1.07	-0.74%	NATIONAL BANK OF I	0.49	434.89
AL SALAM BANK BSC	0.21	1.48%	-	-	-	BAHRAIN CINEMA CC	0.17	131.16
ARAB BANKING CORP BSC-\$US	0.35	1.47%	-	-	-	BBK BSC	0.50	55.00
NATIONAL BANK OF BAHRAIN BSC	0.49	0.82%	-	-	-	BAHRAIN CAR PARKS	0.15	53.78

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Boursa Kuwait

Close	7,917.92		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	16.70	0.21%	Industrials	744.26	734.69	1.30%	-0.11%	2.85%
Previous Close	7,901.22		Banks	1,984.90	1,983.60	0.07%	-2.90%	9.67%
Open	7,899.02		Consumer Service	1,063.98	1,031.18	3.18%	7.80%	6.54%
			Technology	1,113.07	1,171.27	-4.97%	3.38%	6.99%
Day's High	7,920.83		Real Estate	1,575.08	1,565.96	0.58%	3.82%	16.40%
Day's Low	7,878.08		Financial Services	1,475.09	1,469.32	0.39%	-2.21%	-2.35%
YTD Change	7.54%		Telecom	1,059.26	1,053.61	0.54%	0.89%	4.08%
			Health Care	580.60	562.46	3.23%	1.75%	26.69%
Volume Mn	0.62		Insurance	1,853.11	1,907.17	-2.83%	-13.09%	-9.83%
Value Traded Mn	112.20		Basic Materials	914.34	912.26	0.23%	1.72%	0.34%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
KUWAIT HOTELS SAK	238.00	32.22%	FIRST INVESTMENT CO KSCC	41.30	-8.02%	ALIMTIAZ INVESTMEI	43.80	83204.40
KUWAIT REAL ESTATE HOLDING C	39.40	19.03%	AUTOMATED SYSTEMS CO KSCC	153.00	-4.97%	AL SAFAT INVESTMEI	136.00	83166.50
KUWAIT & MIDDLE EAST FIN INV	183.00	10.91%	GULF INSURANCE GROUP KSC	930.00	-4.91%	KUWAIT BUSINESS TC	161.00	49619.55
AL SAFAT INVESTMENT CO	136.00	10.57%	GULF INVESTMENT HOUSE KSC	530.00	-4.85%	KUWAIT REAL ESTATI	39.40	39943.27
EKTTITAB HOLDING CO SAK	14.70	8.89%	GULF FRANCHISING HOLDING CO	126.00	-4.55%	FIRST INVESTMENT C	41.30	34569.42

Source: FSC