

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

08/04/2025



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	3,267.00	(1.8)	(11.9)	19.4	21.3	3.2	3.0	2.03%
MSCI Emerging Markets Index	1,001.49	(7.9)	(6.9)	14.7	15.2	1.8	1.7	3.02%
MSCI FM FRONTIER MARKETS	533.33	(3.1)	0.1	-	11.8	0.9	1.6	4.69%

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	539.03	(1.9)	(5.3)	10.2	13.9	1.5	1.7	5.00%
Muscat Stock Exchange MSX 30 Index	4,260.72	0.9	(6.9)	9.3	12.5	0.8	0.8	6.45%
Tadawul All Share Index	11,339.13	1.3	(5.8)	17.4	22.2	2.1	2.4	3.96%
Dubai Financial Market General Index	4,880.57	1.7	(5.4)	8.6	11.3	1.3	1.1	5.92%
FTSE ADX GENERAL INDEX	9,013.93	0.7	(4.3)	19.9	21.8	2.4	2.4	2.43%
Qatar Exchange Index	9,896.65	1.3	(6.4)	10.7	14.1	1.2	1.5	5.07%
Bahrain Bourse All Share Index	1,899.37	0.1	(4.4)	14.1	11.2	1.3	0.9	9.48%
Boursa Kuwait All Share Price Return Ir	7,741.13	2.7	5.1	16.6	20.9	1.8	1.6	3.07%

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	518.93	(8.4)	(8.9)	14.2	17.1	1.6	1.7	2.95%
MSCI AC Asia Ex. Japan Index	646.62	(8.9)	(8.2)	15.2	16.8	1.7	1.7	0.00%
Nikkei 225	33,012.58	6.0	(17.3)	15.4	25.5	1.6	1.9	2.15%
S&P/ASX 200	7,509.98	2.3	(8.0)	18.4	19.3	2.1	2.2	3.93%
Hang Seng Index	20,127.68	1.5	0.3	10.0	11.0	1.1	1.1	4.32%
NSE Nifty 50 Index	22,535.85	1.7	(4.7)	20.6	24.0	3.3	3.3	1.38%

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	158.90	(4.5)	(6.5)	14.0	16.3	2.0	2.0	3.60%
MSCI Emerging Markets Europe Index	125.51	(3.1)	6.0	9.6	7.3	1.2	1.0	3.83%
FTSE 100 Index	7,826.34	1.6	(4.2)	11.4	14.1	1.7	1.7	4.01%
Deutsche Boerse AG German Stock Inc	20,017.13	1.1	0.5	16.2	15.5	1.7	1.7	2.80%
CAC 40	6,997.69	1.0	(5.2)	13.9	16.2	1.7	1.8	3.52%

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	5,017.36	(0.3)	(13.9)	21.8	23.9	4.2	4.2	1.55%
S&P 500 INDEX	5,062.25	(0.2)	(13.9)	21.7	23.8	4.4	4.4	1.51%
Dow Jones Industrial Average	37,965.60	(0.9)	(10.8)	20.0	21.4	4.9	4.7	1.88%
NASDAQ Composite Index	15,603.26	0.1	(19.2)	29.1	39.1	5.6	6.0	0.85%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	514.57	-1.6	-6.4	-37%		125%	
Gold Spot \$/Oz	3,008.17	0.8	14.6	-4%		186%	
BRENT CRUDE FUTR Jun25	64.41	0.3	-12.4	-23%		39%	
Generic 1st'OQA' Future	65.35	-0.1	-14.1	-48%		254%	
LME COPPER 3MO (\$)	8,732.00	-0.5	-0.4	-20%		102%	
SILVER SPOT \$/OZ	30.26	0.6	4.7	-13%		153%	

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,260.72							
Change	36.89	0.87%						
Previous Close	4,223.83		Financial Sector	7,534.07	7,478.38	0.74%	-2.04%	-2.48%
Open	4,229.03		Industry Sector	5,463.02	5,401.86	1.13%	-1.53%	3.65%
Day's High	4,277.16		Services Sector	1,524.50	1,517.68	0.45%	-4.69%	-12.54%
Day's Low	4,228.38							
YTD Change	-6.90%							
Volume Mn	55.28							
MSX30 Value Traded Mn	7.95							
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
OMAN FISHERIES	0.030	11.11%	SMN POWER HOLDING	0.217	-7.26%	ASYAD SHIPPING	0.118	18637.65
RAYSUT CEMENT	0.090	9.76%	MUSCAT CITY DESALINATION	0.064	-5.88%	OQ GAS NETWORKS	0.128	10656.65
MUSCAT GASES	0.094	9.30%	MUSCAT THREAD MILLS	0.125	-3.85%	OQ BASE INDUSTRIES	0.101	5680.29
MUSCAT FINANCE	0.047	9.30%	NATIONAL BANK OMAN	0.280	-3.45%	BANK MUSCAT	0.252	4636.77
OMAN EMIRATES HO.	0.063	8.62%	OMAN CHLORINE	0.369	-2.89%	SOHAR INTERNATION	0.131	4601.25

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,339.13							
Change	145.11	1.30%	Tadawul Banks	12,317.80	12,100.40	1.80%	-5.45%	-6.73%
Previous Close	11,194.02		Tadawul Energy	4,824.63	4,790.23	0.72%	-3.36%	-4.97%
Open	11,393.87		Tadawul Utilities	11,380.31	11,399.33	-0.17%	-3.78%	-4.75%
Day's High	11,533.11		Tadawul Telecom	8,668.15	8,533.29	1.58%	-2.58%	-2.16%
Day's Low	11,322.25		Tadawul Insurance	8,841.64	8,647.38	2.25%	-5.95%	-7.81%
YTD Change	-5.79%		Tadawul Retailing	7,456.24	7,443.99	0.16%	-3.65%	-4.15%
Volume Mn	587,602.81		Tadawul Food & Beverages	5,432.97	5,428.29	0.09%	-3.49%	-4.26%
Value Traded Mn	10,562.89		Tadawul Media	20,854.96	20,232.65	3.08%	-5.61%	-4.91%
Traded / Listed Stocks	253	228	Tadawul Materials	4,946.06	4,901.28	0.91%	-4.46%	-6.14%
			Tadawul Capital Goods	12,652.45	12,223.52	3.51%	-7.71%	-8.20%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
ZAMIL INDUSTRIAL INVESTMENT	35.25	7.63%	AL HASOOB CO	50.00	-9.09%	AL-BAHA DEVELOPMI	0.35	56882.88
SAUDI CABLE CO	122.8	6.23%	AME COMPANY FOR MEDICAL SUPP	122.00	-7.44%	BATIC INVESTMENTS	2.29	24095.46
SALAMA COOPERATIVE INSURANCE	15.02	6.22%	GROUP FIVE PIPE SAUDI LTD	35.00	-5.53%	SAUDI ARABIAN OIL C	25.40	13300.81
ALDREES PETROLEUM AND TRANSP	140	6.06%	NASEEJ FOR TECHNOLOGY CO	55.00	-3.51%	TOURISM ENTERPRIS	0.79	12986.71
FAWAZ ABDULAZIZ ALHOKAIR & C	11.68	5.99%	ENMA AL-RAWABI COMPANY	27.10	-3.21%	ALINMA BANK	28.85	6626.79

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,880.57							
Change	81.56	1.70%						
Previous Close	4,799.01		Real Estate & Construction	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
Open	4,801.33		Banking	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
			Investment and Financial	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
Day's High	4,908.27		Insurance	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
Day's Low	4,800.88		Consumer Staples	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
YTD Change	-0.05		Services	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
			Industrial	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
Volume Mn	269,007.35		Telecommunication	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
Value Traded Mn	1,131.15		Transportation	49,423.00	49,423.00	0.00%	49,423.00	49,423.00
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
SHUAA CAPITAL PSC	0.211	6.57%	DUBAI REFRESHMENTS COMPANY	20.7	-10.00%	SHUAA CAPITAL PSC	0.21	44,158.91
COMMERCIAL BANK OF DUBAI	7.45	4.93%	NATIONAL CEMENT CO	3.85	-7.89%	DRAKE & SCULL INTEI	0.30	36,069.86
AL SALAM BANK SUDAN	0.63	3.28%	BHM CAPITAL FINANCIAL SERVIC	1.57	-3.09%	EMAAR PROPERTIES I	11.70	22,736.67
MASHREQBANK	233	3.10%	ISLAMIC ARAB INSURANCE COM	0.366	-2.40%	DEYAAR DEVELOPME	0.87	18,015.03
TABREED	2.64	2.72%	GULF NAVIGATION HOLDING PJSC	5.32	-1.85%	UNION PROPERTIES F	0.51	16,197.28

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,013.93							
Change	64.76	0.72%						
Previous Close	8,949.17		Financial	16,491.09	16,372.72	0.72%	-1.34%	-2.04%
Open	8,949.17		Telecommunication	3,915.86	3,982.79	-1.68%	-5.04%	-5.71%
			Consumer Services	8,259.05	8,281.41	-0.27%	-1.95%	-8.11%
Day's High	9,078.89		Basic Material	4,589.19	4,412.90	3.99%	3.95%	3.43%
Day's Low	8,949.17		Industrials	2,357.24	2,298.20	2.57%	-3.78%	-6.45%
YTD Change	-4.30%		Utilities	12,316.33	11,998.49	2.65%	0.00%	-11.68%
			Energy	2,014.22	1,964.17	2.55%	-1.35%	-6.69%
Volume Mn	467,182.15		Health Care	1,828.23	1,838.29	-0.55%	-6.61%	-12.45%
Value Traded Mn	1,601.88		Real Estate	11,135.35	11,243.64	-0.96%	-2.57%	-10.09%
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
ALPHA DHABI HOLDING PJSC	10.78	8.67%	ALKHALEEF INVESTMENT	4.05	-8.99%	BOROUGE	2.54	65360.44
ADNOC DRILLING CO PJSC	4.9	7.93%	EMIRATES INSURANCE CO. (PSC)	7.25	-8.81%	ESHRAQ INVESTMEN'	0.40	41032.51
ABU DHABI SHIP BUILDING CO	5.58	7.31%	ABU DHABI NATIONAL TAKAFUL C	5.42	-7.67%	MULTIPLY GROUP	1.52	36918.69
GHITHA HOLDING PJSC	16.8	6.33%	FUJAIRAH CEMENT INDUSTRIES	0.32	-7.51%	ABU DHABI NATIONA	0.52	13679.95
ESHRAQ INVESTMENTS PJSC	0.403	4.95%	GULF MEDICAL PROJECTS	1.8	-5.26%	ALDAR PROPERTIES P	7.52	9259.67

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Qatar Stock Exchange

Close	9,896.65		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	130.60	1.34%	Total Return	23,347.13	23,039.02	1.34%	-3.29%	-3.29%
Previous Close	9766.05		Rayan Islamic	4,768.41	4,691.56	1.64%	-2.59%	-2.59%
Open	9766.05		All Share	3,636.25	3,588.15	1.34%	-3.26%	-3.26%
			Banks & Finance	4,408.21	4,359.59	1.12%	-4.01%	-4.01%
Day's High	9977.17		Industrials	4,090.38	4,019.74	1.76%	-4.36%	-4.36%
Day's Low	9765.7		Transportation	5,552.75	5,546.38	0.11%	-1.47%	-1.47%
YTD Change	-0.06380037		Real Estate	1,572.51	1,531.47	2.68%	-0.13%	-0.13%
			Insurance	2,257.05	2,168.09	4.10%	1.73%	1.73%
Volume Mn	218.006		Telecommunications	1,941.77	1,904.72	1.95%	-1.07%	-1.07%
Value Traded Mn	565.6804		Consumer Goods	7,655.80	7,582.82	0.96%	-1.89%	-1.89%
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 INSURANCE CO	1.90	5.56%	QATAR NAVIGATION	10.87	-1.09%	QATAR ALUMINUM A	1.20	30216.68
EZDAN HOLDING GROUP	0.95	4.86%	QATAR ELECTRICITY & WATER CO	14.60	-0.61%	EZDAN HOLDING GRC	0.95	26237.68
QATAR GENERAL INSURANCE & RE	1.02	4.29%	-	-	-	AL RAYAN BANK	2.17	15343.39
AAMAL CO	0.89	3.95%	-	-	-	BALADNA	1.15	14962.57
QLM LIFE & MEDICAL INSURANCE	2.00	3.42%	-	-	-	MESAIEED PETROCHE	1.36	12954.46

Bahrain Bourse

Close	1,899.37		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	2.41	0.13%	MSCI Bahrain	149.56	152.25	-1.77%	-3.92%	-4.13%
Previous Close	1,896.96		MSCI Bahrain Domestic Islamic	58.40	59.13	-1.23%	-3.93%	-4.15%
Open	1,896.96		MSCI Bahrain Net TR USD	424.69	438.80	-3.22%	-3.22%	-3.42%
Day's High	1903.750							
Day's Low	1896.960							
YTD Change	-4.36%							
Volume Mn	1,455.20							
Value Traded Mn	0.473							
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
SEEF PROPERTIES	0.12	6.48%	ZAIN BAHRAIN BSCC	0.11	-1.82%	ZAIN BAHRAIN BSCC	0.11	385.00
AL SALAM BANK BSC	0.20	2.08%	ALUMINIUM BAHRAIN BSC	1.07	-1.39%	AL SALAM BANK BSC	0.20	212.61
TRAFICO GROUP BSC	0.30	1.69%	-	-	-	TRAFICO GROUP BSC	0.30	74.53
BBK BSC	0.48	1.05%	-	-	-	ITHMAAR HOLDING E	0.02	60.00
NATIONAL BANK OF BAHRAIN BSC	0.49	0.62%	-	-	-	ALUMINIUM BAHRAII	1.07	50.61

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Boursa Kuwait

Close	7,741.13		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	206.27	2.74%	Industrials	714.68	695.55	2.75%	-4.08%	-1.24%
Previous Close	7,534.86		Banks	1,954.94	1,896.09	3.10%	-4.36%	8.02%
Open	7,647.18		Consumer Service	890.33	890.54	-0.02%	-9.80%	-10.85%
			Technology	1,105.80	1,083.97	2.01%	2.70%	6.29%
Day's High	7,759.47		Real Estate	1,487.91	1,443.54	3.07%	-1.92%	9.96%
Day's Low	7,597.21		Financial Services	1,423.93	1,389.15	2.50%	-5.60%	-5.74%
YTD Change	5.14%		Telecom	1,034.08	1,013.11	2.07%	-1.50%	1.61%
			Health Care	570.59	570.59	0.00%	0.00%	24.50%
Volume Mn	0.35		Insurance	2,030.90	2,062.38	-1.53%	-4.75%	-1.18%
Value Traded Mn	106.39		Basic Materials	866.40	866.19	0.02%	-3.61%	-4.92%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
AL SAFAT ENERGY HOLDING COMP	50.00	14.16%	NATIONAL PETROLEUM SERVICES	993.00	-4.98%	KUWAIT FINANCE HO	715.00	32463.01
NOOR FINANCIAL INVESTMENT CO	310.00	12.32%	GULF INSURANCE GROUP KSC	1140.00	-4.92%	ARZAN FINANCIAL GF	276.00	30979.45
GULF FRANCHISING HOLDING CO	87.00	9.43%	ARKAN AL KUWAIT REAL ESTATE	100.00	-4.76%	NATIONAL INDUSTRII	237.00	17977.97
SPECIALITIES GROUP HOLDING C	151.00	8.63%	WARBA CAPITAL HOLDING CO	262.00	-4.73%	INTL FINANCIAL ADVI	466.00	16879.23
MUNSHAAT REAL ESTATE PROJECT	143.00	8.33%	ALKOUT INDUSTRIAL PROJECTS C	1000.00	-4.67%	KUWAIT BUSINESS TC	121.00	16649.14

Source: FSC