

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

25/05/2025



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	3,802.77	(0.4)	2.6	22.0	21.4	3.6	3.1	1.80%
MSCI Emerging Markets Index	1,170.98	0.5	8.9	14.9	15.2	1.9	1.7	2.69%
MSCI FM FRONTIER MARKETS	588.48	0.1	10.5	10.2	12.6	1.6	1.7	4.29%

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	610.95	0.1	7.3	10.4	13.9	1.7	1.7	4.45%
Muscat Stock Exchange MSX 30 Index	4,514.60	0.4	(1.4)	8.0	12.5	0.9	0.8	6.11%
Tadawul All Share Index	11,055.34	(1.2)	(8.2)	17.1	22.2	2.1	2.4	4.22%
Dubai Financial Market General Index	5,464.16	0.2	5.9	9.5	11.4	1.6	1.1	5.42%
FTSE ADX GENERAL INDEX	9,665.34	(0.0)	2.6	18.3	22.0	2.5	2.4	2.38%
Qatar Exchange Index	10,736.41	(0.4)	1.6	11.9	14.1	1.3	1.5	4.64%
Bahrain Bourse All Share Index	1,921.49	(0.0)	(3.2)	13.6	11.3	1.4	1.0	4.08%
Boursa Kuwait All Share Price Return I	8,039.38	(0.2)	9.2	10.4	21.0	1.4	1.6	3.39%
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	614.50	0.6	7.9	16.2	17.1	1.9	1.8	2.64%
MSCI AC Asia Ex. Japan Index	762.15	0.5	8.2	15.7	16.8	1.8	1.7	0.00%
Nikkei 225	37,160.47	0.5	(6.9)	17.8	25.5	1.9	1.9	2.00%
S&P/ASX 200	8,360.88	0.1	2.5	20.9	19.4	2.4	2.2	3.53%
Hang Seng Index	23,601.26	0.2	17.7	11.9	11.0	1.3	1.1	3.52%
NSE Nifty 50 Index	24,853.15	1.0	5.1	24.0	24.1	3.4	3.4	1.26%

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	182.28	(0.9)	7.3	15.9	16.3	2.2	2.0	3.21%
MSCI Emerging Markets Europe Index	145.53	(0.9)	22.9	10.8	7.4	1.3	1.0	3.63%
FTSE 100 Index	8,717.97	(0.2)	6.7	13.1	14.1	2.0	1.8	3.53%
Deutsche Boerse AG German Stock In	23,629.58	(1.5)	18.7	20.2	15.6	2.0	1.7	2.46%
CAC 40	7,734.40	(1.7)	4.8	16.1	16.0	1.8	1.8	3.18%

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	5,774.78	(0.6)	(0.9)	25.1	24.1	4.8	4.3	1.37%
S&P 500 INDEX	5,802.82	(0.7)	(1.3)	24.8	23.9	5.0	4.4	1.32%
Dow Jones Industrial Average	41,603.07	(0.6)	(2.2)	23.1	21.5	5.2	4.8	1.73%
NASDAQ Composite Index	18,737.21	(1.0)	(3.0)	34.8	39.1	6.7	6.1	0.71%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	535.0	0.4	-2.7	-35%		134%	
Gold Spot \$/Oz	3,357.5	1.9	27.9	-2%		219%	
BRENT CRUDE FUTR Jul25	64.8	0.5	-11.6	-22%		39%	
Generic 1st'OQA' Future	64.0	0.3	-15.9	-49%		247%	
LME COPPER 3MO (\$)	9,610.0	1.2	9.6	-12%		122%	
SILVER SPOT \$/OZ	33.5	1.3	15.8	-4%		179%	

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,514.60							
Change	17.12	0.38%						
Previous Close	4,497.48		Financial Sector	7,926.54	7,908.34	0.23%	3.74%	2.60%
Open	4,497.48		Industry Sector	6,230.63	6,200.11	0.49%	4.53%	18.21%
Day's High	4,514.60		Services Sector	1,598.60	1,588.62	0.63%	3.94%	-8.29%
Day's Low	4,479.18							
YTD Change	-1.35%							
Volume Mn	34.28							
MSX30 Value Traded Mn	5.46							
Traded Securities	55.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN CABLES INDUSTRY	2.155	4.61%	OMAN CEMENT	0.430	-4.23%	OQ BASE INDUSTRIES (SFZ)	0.115	5687.9
JABAL REIF	0.104	4.00%	CONSTRUCTION MATERIAL INDUSTRIE	0.082	-3.53%	SOHAR INTERNATIONAL BANK	0.141	5643.9
ALANWAR INVESTMENT	0.086	3.61%	OMAN NATIONAL ENGINEERING & IN	0.115	-2.54%	ASYAD SHIPPING	0.121	4518.6
OMAN CHROMITE	3.621	3.46%	OQ EXPLORATION AND PRODUCTION	0.283	-2.08%	OQ GAS NETWORKS	0.145	3930.3
PHOENIX POWER	0.064	3.23%	MUSCAT FINANCE	0.050	-1.96%	BANK MUSCAT	0.275	2264.5

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,055.34							
Change	-133.40	-1.19%	Tadawul Banks	12,011.42	12,202.97	-1.57%	-1.57%	-5.16%
Previous Close	11,188.74		Tadawul Energy	4,761.89	4,771.09	-0.19%	-0.19%	-1.08%
Open	11,201.26		Tadawul Utilities	9,365.63	9,755.32	-3.99%	-3.99%	-16.73%
Day's High	11,207.76		Tadawul Telecom	8,255.73	8,340.68	-1.02%	-1.02%	-11.06%
Day's Low	11,043.08		Tadawul Insurance	8,948.24	9,069.62	-1.34%	-1.34%	-3.77%
YTD Change	-8.15%		Tadawul Retailing	7,283.82	7,332.16	-0.66%	-0.66%	-4.37%
Volume Mn	199,913.62		Tadawul Food & Beverages	5,145.02	5,196.46	-0.99%	-0.99%	-5.68%
Value Traded Mn	4,402.12		Tadawul Media	18,242.90	18,523.48	-1.51%	-1.51%	-15.91%
Traded / Listed Stocks	253	228	Tadawul Materials	5,028.24	5,076.13	-0.94%	-0.94%	-3.37%
			Tadawul Capital Goods	14,136.23	14,204.03	-0.48%	-0.48%	1.11%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
RAOOM TRADING CO	75.80	9.86%	NATIONAL BUILDING AND MARKET	167.00	-8.54%	ALINMA BANK	26.55	7987.9
SAUDI STEEL PIPE CO	61.50	5.31%	ACWA POWER CO	258.60	-5.00%	AL-BAHA DEVELOPMENT & INVEST	3.84	7695.2
NATIONAL ENVIORNMENTAL RECYC	7.50	4.46%	GROUP FIVE PIPE SAUDI LTD	28.70	-4.33%	SAUDI ARABIAN OIL CO	25.10	6702.8
ASTRA INDUSTRIAL GROUP	163.20	3.95%	SAUDI PARTS CENTER CO	44.00	-4.14%	TOURISM ENTERPRISE CO/ SHAMS	0.80	4404.8
CHUBB ARABIA COOPERATIVE INS	37.15	3.48%	UMM AL-QURA CEMENT CO	17.00	-3.08%	BATIC INVESTMENTS AND LOGIST	2.29	3725.7

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,464.16							
Change	11.40	0.21%						
Previous Close	5,452.76		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	5,452.76		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	5,468.18		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	5,443.12		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.06		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	81,791.07		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	398.89		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
NATIONAL CEMENT CO	3.59	5.90%	NATIONAL GENERAL INSURANCE	5.53	-9.64%	DRAKE & SCULL INTERNATIONAL	0.31	15315.27
DUBAI REFRESHMENTS COMPANY	22.95	5.76%	ISLAMIC ARAB INSURANCE COM	0.374	-1.32%	DUBAI ELECTRICITY & WATER AU	2.69	14383.06
GULF NAVIGATION HOLDING PJSC	5.51	2.04%	AMLAK FINANCE	0.83	-0.95%	DEYAAR DEVELOPMENT PJSC	0.89	8663.56
DUBAI NATIONAL INSURANCE	3	1.35%	COMMERCIAL BANK OF DUBAI	8.42	-0.94%	DUBAI ISLAMIC BANK	7.99	7977.79
EMIRATES NBD PJSC	23	1.32%	DUBAI INVESTMENTS PJSC	2.37	-0.84%	EMAAR PROPERTIES PJSC	13.55	6867.87

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,665.34							
Change	-1.92	-0.02%						
Previous Close	9,667.26		Financial	17,627.10	17,636.19	-0.05%	0.00%	1.71%
Open	9,667.26		Telecommunication	4,252.95	4,229.74	0.55%	0.00%	-0.52%
			Consumer Services	9,200.98	9,170.07	0.34%	0.00%	0.06%
Day's High	9,688.96		Basic Material	4,714.91	4,733.78	-0.40%	0.00%	0.18%
Day's Low	9,651.94		Industrials	2,542.96	2,556.62	-0.53%	0.00%	0.36%
YTD Change	2.62%		Utilities	12,594.44	12,554.71	0.32%	0.00%	0.00%
			Energy	2,163.80	2,169.35	-0.26%	0.00%	2.70%
Volume Mn	252,856.08		Health Care	2,008.38	2,016.10	-0.38%	0.00%	-2.11%
Value Traded Mn	1,083.78		Real Estate	12,319.92	12,298.23	0.18%	0.00%	1.23%
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
INSURANCE HOUSE	0.71	14.52%	RESPONSE PLUS HOLDING PJSC	4.5	-4.05%	ABU DHABI NATIONAL HOTELS	0.50	19394.54
FUJAIRAH CEMENT INDUSTRIES	0.335	8.06%	GHITHA HOLDING PJSC	21.86	-2.41%	MULTIPLY GROUP	2.15	18887.95
PALMS SPORTS P.J.S.C	7.01	5.41%	ALPHA DHABI HOLDING PJSC	11.66	-2.35%	BOROUGE	2.51	14066.75
NMDC GROUP PJSC	25.5	1.84%	ESHRAQ INVESTMENTS PJSC	0.42	-1.87%	ESHRAQ INVESTMENTS PJSC	0.42	12134.94
RAS AL KHAIMAH WHITE CEMENT	1.13	1.80%	MANAZEL REAL ESTATE PJSC	0.334	-0.89%	ALPHA DHABI HOLDING PJSC	11.66	6588.19

Qatar Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,736.41							
Change	-37.85	-0.35%	Total Return	25,328.21	25,417.49	-0.35%	-0.35%	2.64%
Previous Close	10774.26		Rayan Islamic	5,120.15	5,146.05	-0.50%	-0.50%	1.83%
Open	10774.26		All Share	3,961.88	3,977.98	-0.40%	-0.40%	2.84%
			Banks & Finance	4,958.81	4,968.88	-0.20%	-0.20%	4.63%
Day's High	10797.69		Industrials	4,268.98	4,289.56	-0.48%	-0.48%	0.48%
Day's Low	10736.41		Transportation	5,764.56	5,821.25	-0.97%	-0.97%	3.11%
YTD Change	0.01563891		Real Estate	1,629.06	1,639.03	-0.61%	-0.61%	-0.33%
			Insurance	2,329.44	2,357.79	-1.20%	-1.20%	-0.12%
Volume Mn	159.665		Telecommunications	2,210.69	2,222.51	-0.53%	-0.53%	0.36%
Value Traded Mn	274.1541		Consumer Goods	7,982.09	8,022.50	-0.50%	-0.50%	0.70%
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
COMMERCIAL BANK PSQC	4.52	2.96%	QLM LIFE & MEDICAL INSURANCE	1.98	-5.81%	AL FALEH EDUCATION HOLDING	0.80	29338.93
MANNAI CORPORATION QPSC	4.10	2.50%	VODAFONE QATAR	2.38	-2.73%	MAZAYA REAL ESTATE DEVELOPME	0.63	13242.09
AL FALEH EDUCATION HOLDING	0.80	2.32%	QATAR GAS TRANSPORT(NAKILAT)	4.85	-1.48%	QATAR & OMAN INVESTMENT CO	0.71	12790.43
QATAR & OMAN INVESTMENT CO	0.71	2.03%	BALADNA	1.25	-1.26%	AAMAL CO	0.85	10760.29
QATAR GERMAN CO FOR MEDICAL	1.56	0.71%	MAZAYA REAL ESTATE DEVELOPME	0.63	-1.26%	BALADNA	1.25	9670.74

Bahrain Bourse

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	1,921.49							
Change	-0.86	-0.04%						
Previous Close	1,922.35		MSCI Bahrain	155.06	155.06	0.00%	0.00%	1.36%
Open	1,922.35		MSCI Bahrain Domistic Islamic	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's High	1922.350							
Day's Low	1921.490		MSCI Bahrain Net TR USD	440.25	440.25	0.00%	0.00%	1.35%
YTD Change	-3.24%							
Volume Mn	1,729.85							
Value Traded Mn	0.632							
Traded / Listed Stocks	38	42						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	BHD	%		BHD	%	Companies	BHD	000
-	-	-	-	-	-	NATIONAL BANK OF BAHRAIN BSC	0.50	56.00
-	-	-	-	-	-	ITHMAAR HOLDING BSC	0.04	31.68
-	-	-	-	-	-	ALUMINIUM BAHRAIN BSC	0.96	10.93
-	-	-	-	-	-	GULF HOTEL GROUP B.S.C	0.38	6.14
-	-	-	-	-	-	BAHRAIN FLOUR MILLS CO	#N/A N/A	3.91

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	8,039.38							
Change	-13.51	-0.17%	Industrials	765.95	770.12	-0.54%	1.79%	5.85%
Previous Close	8,052.89		Banks	2,010.59	2,016.64	-0.30%	0.30%	11.09%
Open	8,049.79		Consumer Service	1,119.19	1,107.53	1.05%	6.62%	12.07%
			Technology	1,127.62	1,105.80	1.97%	0.00%	8.39%
Day's High	8,055.41		Real Estate	1,659.61	1,646.29	0.81%	4.31%	22.65%
Day's Low	8,027.60		Financial Services	1,504.34	1,502.54	0.12%	1.70%	-0.41%
YTD Change	9.19%		Telecom	1,040.89	1,043.52	-0.25%	1.05%	2.28%
			Health Care	573.42	573.42	0.00%	-1.24%	25.12%
Volume Mn	0.27		Insurance	1,829.85	1,825.27	0.25%	1.09%	-10.97%
Value Traded Mn	62.84		Basic Materials	912.32	910.58	0.19%	0.19%	0.12%
Traded / Listed Stocks	140	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	KWD	%		KWD	%	Companies	KWD	000
REAL ESTATE TRADE CENTERS CO	297.00	6.45%	NATIONAL INDUSTRIES CO KSC	194.00	-7.18%	FIRST INVESTMENT CO KSCC	41.60	28895.66
KUWAIT NATIONAL CINEMA CO	1080.00	4.85%	DAR AL THURAYA REAL ESTATE C	105.00	-5.41%	KUWAIT BUSINESS TOWN REAL ES	130.00	15998.91
INJAZZAT REAL STATE COMPANY	99.50	4.63%	KUWAIT FINANCIAL CENTRE SAK	135.00	-4.93%	MANAZEL HOLDING	36.90	15434.67
AL TAMDEEN INVESTMENT CO	795.00	4.61%	KUWAIT RESORTS CO KSCC	122.00	-3.94%	INTL FINANCIAL ADVISORS	466.00	14981.86
GULF INVESTMENT HOUSE KSC	626.00	4.33%	PALMS AGRO PRODUCTION CO	217.00	-3.56%	MASHAER HOLDING CO KSC	88.00	14909.41

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