

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

20/07/2025



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	4,065.68	0.1	9.7	23.4	21.5	3.8	3.1	1.70%
MSCI Emerging Markets Index	1,249.38	0.7	16.2	16.2	15.2	2.0	1.7	2.56%
MSCI FM FRONTIER MARKETS	659.72	0.5	23.9	11.4	12.5	1.7	1.7	3.80%

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	666.35	0.1	17.0	11.7	13.9	1.9	1.7	4.08%
Muscat Stock Exchange MSX 30 Index	4,674.40	0.4	2.1	9.5	12.5	0.7	0.8	6.11%
Tadawul All Share Index	10,971.15	(0.3)	(8.9)	16.9	22.1	2.0	2.4	4.26%
Dubai Financial Market General Index	6,093.76	(0.2)	18.1	10.6	11.5	1.8	1.2	4.86%
FTSE ADX GENERAL INDEX	10,261.69	0.2	8.9	20.7	22.3	2.7	2.4	2.21%
Qatar Exchange Index	10,941.71	0.2	3.5	12.1	14.0	1.4	1.5	4.49%
Bahrain Bourse All Share Index	1,944.35	(0.1)	(2.1)	13.2	11.5	1.4	1.0	9.81%
Boursa Kuwait All Share Price Return I	8,602.13	0.0	16.8	21.2	21.3	1.5	1.6	3.12%
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	657.94	1.0	15.5	17.4	17.1	2.0	1.8	2.49%
MSCI AC Asia Ex. Japan Index	818.55	0.8	16.3	16.9	16.8	2.0	1.7	0.00%
Nikkei 225	39,819.11	(0.2)	(0.2)	18.4	25.3	2.1	1.9	1.92%
S&P/ASX 200	8,757.18	1.4	7.3	21.5	19.5	2.5	2.2	3.34%
Hang Seng Index	24,825.66	1.3	23.8	11.9	10.9	1.3	1.1	3.16%
NSE Nifty 50 Index	24,968.40	(0.6)	5.6	24.5	24.5	3.4	3.4	1.30%

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	182.53	(0.1)	7.4	15.7	16.3	2.1	2.0	3.18%
MSCI Emerging Markets Europe Index	163.31	1.3	38.0	11.7	8.1	1.4	1.1	3.25%
FTSE 100 Index	8,992.12	0.2	10.0	13.6	14.2	2.0	1.8	3.41%
Deutsche Boerse AG German Stock In	24,289.51	(0.3)	22.0	20.8	15.7	2.0	1.7	2.44%
CAC 40	7,822.67	0.0	6.0	16.1	16.0	1.9	1.8	3.20%

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	6,264.55	0.0	7.5	26.9	24.2	5.1	4.3	1.26%
S&P 500 INDEX	6,296.79	(0.0)	7.1	26.7	24.1	5.3	4.5	1.23%
Dow Jones Industrial Average	44,342.19	(0.3)	4.2	23.6	21.6	5.6	4.8	1.64%
NASDAQ Composite Index	20,895.66	0.0	8.2	43.0	39.3	7.4	6.1	0.66%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high		% chg from 10 year Low	
S&P GSCI Index Spot	551.6	0.4	0.4	-33%		142%	
Gold Spot \$/Oz	3,349.9	0.3	27.6	-2%		219%	
BRENT CRUDE FUTR Sep25	69.3	-0.3	-4.6	-16%		48%	
Generic 1st'OQA' Future	71.1	0.1	-6.5	-43%		285%	
LME COPPER 3MO (\$)	9,778.5	1.2	11.5	-10%		126%	
SILVER SPOT \$/OZ	38.2	0.1	32.1	-1%		219%	

Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,674.40							
Change	20.05	0.43%						
Previous Close	4,654.34		Financial Sector	8,064.13	8,045.68	0.23%	2.73%	4.38%
Open	4,654.34		Industry Sector	6,726.31	6,733.75	-0.11%	3.98%	27.62%
Day's High	4,682.17		Services Sector	1,736.25	1,722.22	0.81%	8.55%	-0.39%
Day's Low	4,651.70							
YTD Change	2.14%							
Volume Mn	175.11							
MSX30 Value Traded Mn	28.51							
Traded Securities	62.00							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
GLOBAL FINANCIAL INVESTMENT HO.	0.147	8.89%	UNITED.FINA BONDS	0.060	-40.00%	OQ BASE INDUSTRIES (SFZ)	0.133	79579.1
ALBATINAH POWER	0.084	5.00%	DHOFAR FOODS AND INVESTMENT	0.072	-8.86%	SOHAR INTERNATIONAL BANK	0.138	26459.4
AL SUWADI POWER	0.083	3.75%	ARABIA FALCON INSURANCE	0.125	-3.85%	OQ GAS NETWORKS	0.149	17529.9
OQ EXPLORATION AND PRODUCTION	0.341	3.65%	UNITED FINANCE	0.060	-3.23%	ASYAD SHIPPING	0.122	16865.5
OMAN NATIONAL ENGINEERING & IN'	0.121	3.42%	BARKA WATER AND POWER	0.199	-2.93%	BANK MUSCAT	0.284	12775.0

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,971.15							
Change	-35.83	-0.33%	Tadawul Banks	12,139.90	12,157.75	-0.15%	-0.15%	-1.06%
Previous Close	11,006.98		Tadawul Energy	4,571.49	4,576.54	-0.11%	-0.11%	-1.02%
Open	11,020.94		Tadawul Utilities	8,882.58	8,898.03	-0.17%	-0.17%	-5.15%
Day's High	11,085.43		Tadawul Telecom	8,200.83	8,263.22	-0.76%	-0.76%	-2.89%
Day's Low	10,968.44		Tadawul Insurance	8,977.46	9,022.89	-0.50%	-0.50%	-6.67%
YTD Change	-8.85%		Tadawul Retailing	7,572.23	7,611.79	-0.52%	-0.52%	0.32%
Volume Mn	252,180.73		Tadawul Food & Beverages	4,882.24	4,918.43	-0.74%	-0.74%	-4.93%
Value Traded Mn	4,199.03		Tadawul Media	21,451.73	21,549.04	-0.45%	-0.45%	-4.58%
Traded / Listed Stocks	256	228	Tadawul Materials	5,176.36	5,213.50	-0.71%	-0.71%	0.75%
			Tadawul Capital Goods	14,960.89	15,000.02	-0.26%	-0.26%	-0.76%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies	SAR	000
AL JOUF MINERAL WATER BOTTLI	1.54	9.22%	NATIONAL BUILDING AND MARKET	142.90	-5.36%	TOURISM ENTERPRISE CO/ SHAMS	0.94	110059.5
TOURISM ENTERPRISE CO/ SHAMS	0.94	8.05%	ALLIANZ SAUDI FRANSI COOPERA	15.78	-4.36%	ARAB SEA INFORMATION SYSTEMS	5.57	7880.3
ARAB SEA INFORMATION SYSTEMS	5.57	6.08%	ALWASAIL INDUSTRIAL CO	3.49	-4.12%	SAUDI ARABIAN OIL CO	24.08	7819.1
MAADANIYAH	16.07	3.61%	SHL FINANCE CO	22.39	-4.03%	BATIC INVESTMENTS AND LOGIST	2.36	3866.9
LEEJAM SPORTS CO JSC	140.00	3.47%	ZAMIL INDUSTRIAL INVESTMENT	42.88	-3.86%	SAUDI CHEMICAL CO HOLDING	7.41	3729.0

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

Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	6,093.76							
Change	-9.33	-0.15%						
Previous Close	6,103.09		Real Estate & Construction	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Open	6,103.84		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	6,114.44		Insurance	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Day's Low	6,052.30		Consumer Staples	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
YTD Change	0.18		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	120,114.03		Telecommunication	#N/A N/A	#N/A N/A	#VALUE!	#VALUE!	#VALUE!
Value Traded Mn	565.38		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
BHM CAPITAL FINANCIAL SERVIC	1.32	3.94%	COMMERCIAL BANK OF DUBAI	9.63	-3.60%	UNION PROPERTIES PJSC	0.87	24563.00
AMANAT HOLDINGS PJSC	1.14	3.64%	EMIRATES NBD PJSC	26.8	-2.37%	DRAKE & SCULL INTERNATIONAL	0.35	16172.50
AL RAMZ CORPORATION INVESTME	1.24	3.33%	UNION PROPERTIES PJSC	0.874	-1.69%	EMAAR PROPERTIES PJSC	15.05	14978.40
ISLAMIC ARAB INSURANCE COM	0.417	2.46%	DUBAI FINANCIAL MARKET PJSC	1.8	-1.10%	DEYAAR DEVELOPMENT PJSC	1.02	13592.75
MASHREQBANK	265	2.32%	SHUAA CAPITAL PSC	0.263	-0.75%	DUBAI ELECTRICITY & WATER AU	2.81	10587.81

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,261.69							
Change	19.20	0.19%						
Previous Close	10,242.49		Financial	18,587.23	18,586.31	0.00%	0.00%	2.89%
Open	10,242.49		Telecommunication	4,621.73	4,542.44	1.75%	0.00%	6.60%
			Consumer Services	8,627.55	8,620.78	0.08%	0.00%	-0.05%
Day's High	10,283.98		Basic Material	4,882.73	4,882.73	0.00%	0.00%	3.69%
Day's Low	10,242.49		Industrials	2,643.55	2,633.42	0.38%	0.00%	0.74%
YTD Change	8.95%		Utilities	13,269.85	13,190.39	0.60%	0.00%	-4.84%
			Energy	2,277.71	2,277.49	0.01%	0.00%	-0.55%
Volume Mn	363,404.95		Health Care	2,174.44	2,181.61	-0.33%	0.00%	11.62%
Value Traded Mn	1,264.62		Real Estate	14,348.65	14,314.06	0.24%	0.00%	8.80%
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 NATL CO FOR BUILDI	1.81	7.74%	COMMERCIAL BANK INTERNATIONA	1.01	-8.18%	MULTIPLY GROUP	2.65	27316.08
ALKHALEEJ INVESTMENT	5.7	4.78%	RAS AL KHAIMAH WHITE CEMENT	1.1	-3.51%	MANAZEL REAL ESTATE PJSC	0.35	16858.05
WAHA CAPITAL PJSC	1.63	3.82%	GULF PHARMACEUTICAL IND PSC	1.44	-2.04%	ABU DHABI COMMERCIAL BANK	15.36	10156.23
RAS AL KHAIMAH CERAMICS PJSC	2.55	2.41%	PALMS SPORTS P.J.S.C	7.31	-2.01%	ABU DHABI NATL CO FOR BUILDI	1.81	8081.04
AL SEER MARINE SUPPLIES & EQ	3.84	2.40%	EASY LEASE MOTOR CYCLE PRJSC	28	-1.89%	ALDAR PROPERTIES PJSC	9.74	7808.86

Qatar Stock Exchange

Close	10,941.71		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	26.51	0.24%	Total Return	25,916.44	25,776.89	0.54%	0.54%	2.20%
Previous Close	10915.2		Rayan Islamic	5,209.32	5,182.21	0.52%	0.52%	1.85%
Open	10915.2		All Share	4,065.58	4,039.75	0.64%	0.64%	2.26%
			Banks & Finance	5,104.34	5,065.37	0.77%	0.77%	3.03%
Day's High	10948.54		Industrials	4,404.62	4,373.03	0.72%	0.72%	2.99%
Day's Low	10876.68		Transportation	5,772.08	5,787.02	-0.26%	-0.26%	-1.60%
YTD Change	0.03505978		Real Estate	1,672.60	1,667.98	0.28%	0.28%	2.13%
			Insurance	2,463.77	2,439.82	0.98%	0.98%	-0.82%
Volume Mn	161.769		Telecommunications	2,156.98	2,149.25	0.36%	0.36%	-1.25%
Value Traded Mn	373.6553		Consumer Goods	8,311.10	8,255.21	0.68%	0.68%	3.23%
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
MANNAI CORPORATION QPSC	7.05	2.93%	QATAR CINEMA & FILM DISTRIB	2.37	-1.17%	BALADNA	1.33	37928.50
VODAFONE QATAR	2.34	1.91%	WIDAM FOOD CO	2.21	-0.85%	QATAR ALUMINUM MANUFACTUR	1.40	12427.14
BALADNA	1.33	1.84%	DLALA HOLDING	1.05	-0.75%	EZDAN HOLDING GROUP	1.12	12319.57
MEDICARE GROUP	5.70	1.79%	QATAR GAS TRANSPORT(NAKILAT)	4.87	-0.61%	GULF INTERNATIONAL SERVICES	3.30	9088.14
QATAR INSURANCE CO	2.08	1.66%	ALIJARAH HOLDING COMPANY QPS	0.74	-0.54%	UNITED DEVELOPMENT CO	1.05	8629.70

Bahrain Bourse

Close	1,944.35		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-1.11	-0.06%						
Previous Close	1,945.46		MSCI Bahrain	164.88	164.88	0.00%	0.00%	2.27%
Open	1,945.46		MSCI Bahrain Domestic Islamic	#N/A N/A	0.00	#VALUE!	#VALUE!	#VALUE!
Day's High	1946.380							
Day's Low	1944.070		MSCI Bahrain Net TR USD	468.14	468.19	-0.01%	0.00%	2.30%
YTD Change	-2.09%							
Volume Mn	4,309.27							
Value Traded Mn	0.673							
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 KUWAIT INSURANCE	0.38	5.56%	BAHRAIN COMMERCIAL FACILITIE	0.26	-3.77%	GFH FINANCIAL GROUP BSC	0.35	1567.79
BAHRAIN ISLAMIC BANK	0.08	3.85%	SEEF PROPERTIES	0.12	-0.82%	ITHMAAR HOLDING BSC	0.03	310.00
ITHMAAR HOLDING BSC	0.03	3.23%	ALUMINIUM BAHRAIN BSC	0.94	-0.63%	AL SALAM BANK BSC	0.24	251.80
GULF HOTEL GROUP B.S.C	0.43	1.18%	BBK BSC	0.51	-0.39%	NATIONAL BANK OF BAHRAIN BSC	0.50	182.17
AL SALAM BANK BSC	0.24	0.43%	NATIONAL BANK OF BAHRAIN BSC	0.50	-0.20%	BAHRAIN KUWAIT INSURANCE	0.38	60.28

Boursa Kuwait

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	8,602.13							
Change	3.71	0.04%	Industrials	679.43	680.99	-0.23%	-5.49%	-6.11%
Previous Close	8,598.42		Banks	2,195.27	2,198.15	-0.13%	1.53%	21.30%
Open	8,610.62		Consumer Service	1,344.56	1,333.18	0.85%	1.08%	34.63%
			Technology	1,818.75	1,884.22	-3.47%	64.47%	74.83%
Day's High	8,617.99		Real Estate	1,805.18	1,784.36	1.17%	2.04%	33.41%
Day's Low	8,583.99		Financial Services	1,615.63	1,617.07	-0.09%	4.92%	6.95%
YTD Change	16.84%		Telecom	1,101.65	1,102.38	-0.07%	4.69%	8.25%
			Health Care	508.34	514.00	-1.10%	-10.77%	10.92%
Volume Mn	0.86		Insurance	1,991.72	2,038.38	-2.29%	4.70%	-3.09%
Value Traded Mn	113.18		Basic Materials	885.11	877.06	0.92%	3.47%	-2.87%
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
DAR AL THURAYA REAL ESTATE C	269.00	85.52%	CREDIT RATING & COLLECTION	400.00	-16.14%	MANAZEL HOLDING	54.30	133588.80
MANAZEL HOLDING	54.30	31.16%	WETHAQ TAKAFUL INSURANCE CO	128.00	-14.09%	FIRST INVESTMENT CO KSCC	89.00	72191.68
AL SAFAT ENERGY HOLDING COMP	97.00	27.80%	INJAZZAT REAL STATE COMPANY	111.00	-9.02%	ALIMTIAZ INVESTMENT GROUP	47.40	59166.26
WARBA CAPITAL HOLDING CO	660.00	26.92%	ALIMTIAZ INVESTMENT GROUP	47.40	-8.32%	EKTTITAB HOLDING CO SAK	23.80	56564.35
AL MADAR KUWAIT HOLDING CO	147.00	17.60%	GULF INSURANCE GROUP KSC	1052.00	-6.24%	AL MADAR KUWAIT HOLDING CO	147.00	36748.33

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