

Financial Services Company
GCC Daily Report

2025

Research Department

PO Box 2777, PC 112, Sultanate of Oman
Tel: +968 24825620 Fax: +968 24817205
Website: www.fscoman.net

FSC Daily Report

21/07/2025



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	23.5	21.5	3.8	3.1	1.70%
MSCI Emerging Markets Index	1,249.38	0.7	16.2	16.4	15.2	2.0	1.7	2.56%
MSCI FM FRONTIER MARKETS	659.72	0.5	23.9	-	12.5	1.8	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 In	666.18	(0.0)	17.0	11.7	13.9	1.9	1.7	4.08%
Muscat Stock Exchange MSX 30 Index	4,743.23	1.5	3.6	9.5	12.5	0.9	0.8	6.02%
Tadawul All Share Index	10,963.22	(0.0)	(8.9)	16.8	22.1	2.0	2.4	4.27%
Dubai Financial Market General Index	6,050.22	(0.7)	17.3	10.6	11.5	1.8	1.2	4.90%
FTSE ADX GENERAL INDEX	10,236.49	(0.2)	8.7	20.7	22.3	2.7	2.4	2.21%
Qatar Exchange Index	11,022.14	0.7	4.3	12.1	14.0	1.4	1.5	4.46%
Bahrain Bourse All Share Index	1,937.70	(0.3)	(2.4)	13.2	11.5	1.4	1.0	9.85%
Boursa Kuwait All Share Price Return Ir	8,611.27	0.1	17.0	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 Ir #N/A Requesting C		1.0	15.5	17.6	17.1	2.1	1.8	2.49%
MSCI AC Asia Ex. Japan Index	818.55	0.8	16.3	17.1	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	8,668.17	(1.0)	6.2	21.5	19.6	2.5	2.2	3.37%
Hang Seng Index	24,994.14	0.7	24.6	11.9	10.9	1.3	1.1	3.14%
NSE Nifty 50 Index	25,090.70	0.5	6.1	24.5	24.5	3.4	3.4	1.29%

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	11.9	8.1	1.4	1.1	3.25%
FTSE 100 Index	8,988.43	(0.0)	10.0	13.6	14.2	2.0	1.8	3.41%
Deutsche Boerse AG German Stock Inc	24,239.68	(0.2)	21.8	20.8	15.7	2.0	1.7	2.45%
CAC 40	7,784.33	(0.5)	5.5	16.1	16.0	1.9	1.8	3.21%

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	551.62	0.4	0.4	-33%	142%
Gold Spot \$/Oz	3,363.58	0.4	28.2	-2%	220%
BRENT CRUDE FUTR Sep25	68.97	-0.4	-5.0	-16%	48%
Generic 1st'OQA' Future	70.85	-0.3	-6.8	-44%	284%
LME COPPER 3MO (\$)	9,778.50	1.2	11.5	-10%	126%
SILVER SPOT \$/OZ	38.46	0.7	33.1	0%	221%

Source: FSC

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Muscat Stock Exchange

Close	4,743.23		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	68.84	1.47%						
Previous Close	4,674.40		Financial Sector	8,130.91	8,064.13	0.83%	3.58%	5.24%
Open	4,674.40		Industry Sector	6,718.90	6,726.31	-0.11%	3.86%	27.48%
Day's High	4,747.49		Services Sector	1,786.03	1,736.25	2.87%	11.67%	2.46%
Day's Low	4,668.36							
YTD Change	3.64%							
Volume Mn	145.29							
MSX30 Value Traded Mn	25.31							
Traded Securities	64							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
MAJAN GLASS	0.014	16.67%	SALALAH MILLS	0.431	-7.31%	OQ BASE INDUSTRIES	0.133	67627.26
UNITED.FINA BONDS	0.066	10.00%	NATIONAL BISCUIT INDUSTRIES LIMITED	4.500	-7.02%	BANK MUSCAT	0.300	22563.65
SEMBICORP SALALAH	0.137	9.60%	MUSCAT GASES	0.104	-1.89%	OQ GAS NETWORKS	0.148	12068.51
OOREDOO	0.240	7.14%	MUSCAT FINANCE	0.053	-1.85%	ASYAD SHIPPING	0.123	11961.56
AL SUWADI POWER	0.088	6.02%	OMAN CHROMITE	4.125	-1.79%	SOHAR INTERNATION	0.139	11117.21

Saudi Exchange

Close	10,963.22		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-1.49	-0.01%	Tadawul Banks	12,248.63	12,137.62	0.91%	0.75%	-0.17%
Previous Close	10,964.71		Tadawul Energy	4,573.03	4,577.09	-0.09%	-0.08%	-0.98%
Open	10,982.48		Tadawul Utilities	8,699.26	8,837.49	-1.56%	-2.23%	-7.10%
Day's High	11,002.57		Tadawul Telecom	8,115.43	8,175.33	-0.73%	-1.79%	-3.90%
Day's Low	10,932.33		Tadawul Insurance	8,878.80	8,930.93	-0.58%	-1.60%	-7.70%
YTD Change	-8.92%		Tadawul Retailing	7,524.84	7,505.19	0.26%	-1.14%	-0.31%
Volume Mn	323,411.81		Tadawul Food & Beverages	4,853.58	4,891.21	-0.77%	-1.32%	-5.49%
Value Traded Mn	4,199.03		Tadawul Media	21,366.65	21,409.11	-0.20%	-0.85%	-4.95%
Traded / Listed Stocks	256	228	Tadawul Materials	5,137.07	5,173.65	-0.71%	-1.47%	-0.01%
			Tadawul Capital Goods	14,769.51	14,987.42	-1.45%	-1.54%	-2.03%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
SHL FINANCE CO	23.6	8.76%	SAHARA INTERNATIONAL PETROCH	17.94	-5.48%	TOURISM ENTERPRIS	0.97	171976.19
AL JOUF MINERAL WATER BOTTLI	1.6	3.90%	WAFRAH FOR INDUSTRY AND DEVE	27.08	-5.05%	FAWAZ ABDULAZIZ A	30.76	9090.90
SALAMA COOPERATIVE INSURANCE	13.38	3.72%	AL HASOOB CO	44.00	-4.35%	BATIC INVESTMENTS	2.34	4837.03
SAUDI ARABIA REFINERIES CO	62.65	3.55%	MOHAMMED HASAN AL NAQOOL SON	36.80	-3.16%	SAUDI ARABIAN OIL C	24.09	3947.97
FAWAZ ABDULAZIZ ALHOKAIR & C	30.76	3.50%	ARAB SEA INFORMATION SYSTEMS	5.42	-3.04%	ELECTRICAL INDUSTR	8.87	3496.51

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	6,050.22							
Change	-43.54	-0.71%						
Previous Close	6,093.76		Real Estate & Construction	6,093.76	6,093.76	0.00%	0.00%	0.00%
Open	6,114.81		Banking	6,114.81	6,114.81	0.00%	0.00%	0.00%
			Investment and Financial	6,114.81	6,114.81	0.00%	0.00%	0.00%
Day's High	6,120.96		Insurance	6,120.96	6,120.96	0.00%	0.00%	0.00%
Day's Low	6,043.86		Consumer Staples	6,043.86	6,043.86	0.00%	0.00%	0.00%
YTD Change	0.17		Services	0.17	0.17	0.00%	0.00%	0.00%
			Industrial	0.17	0.17	0.00%	0.00%	0.00%
Volume Mn	120,114.03		Telecommunication	120,114.03	120,114.03	0.00%	0.00%	0.00%
Value Traded Mn	565.38		Transportation	565.38	565.38	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
AL MAL CAPITAL REIT	1.48	9.63%	BHM CAPITAL FINANCIAL SERVIC	1.27	-3.79%	AMLAK FINANCE	1.70	47,517.83
AIR ARABIA PJSC	3.89	4.57%	EMIRATES NBD PJSC	25.85	-3.54%	AIR ARABIA PJSC	3.89	47,393.34
AMANAT HOLDINGS PJSC	1.19	4.39%	NATIONAL GENERAL INSURANCE	6.06	-3.04%	UNION PROPERTIES F	0.87	12,978.37
AMLAK FINANCE	1.7	3.03%	EMIRATES INVESTMENT BANK	75	-1.90%	DRAKE & SCULL INTEI	0.35	12,788.55
DUBAI REFRESHMENTS COMPANY	21.4	1.90%	TAKAFUL EMARAT INSURANCE	1.23	-1.60%	GULF NAVIGATION H	5.95	10,116.24

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	10,236.49							
Change	-25.20	-0.25%						
Previous Close	10,261.69		Financial	18,604.86	18,587.23	0.09%	0.09%	2.99%
Open	10,261.69		Telecommunication	4,556.79	4,621.73	-1.41%	-1.41%	5.10%
			Consumer Services	8,655.87	8,627.55	0.33%	0.33%	0.28%
Day's High	10,274.17		Basic Material	4,876.23	4,882.73	-0.13%	-0.13%	3.55%
Day's Low	10,234.08		Industrials	2,629.07	2,643.55	-0.55%	-0.55%	0.19%
YTD Change	8.68%		Utilities	13,269.85	13,269.85	0.00%	0.00%	-4.84%
			Energy	2,250.39	2,277.71	-1.20%	-1.20%	-1.74%
Volume Mn	363,404.95		Health Care	2,192.07	2,174.44	0.81%	0.81%	12.52%
Value Traded Mn	1,264.62		Real Estate	14,169.64	14,348.65	-1.25%	-1.25%	7.44%
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	4.9	12.64%	ABU DHABI SHIP BUILDING CO	8.17	-2.51%	ESHRAQ INVESTMEN'	0.56	75768.08
BANK OF SHARJAH	1.28	8.47%	ADNOC DRILLING CO PJSC	5.65	-1.91%	MANAZEL REAL ESTA'	0.35	17563.29
PALMS SPORTS P.J.S.C	7.79	6.57%	ALDAR PROPERTIES PJSC	9.58	-1.64%	MULTIPLY GROUP	2.64	11834.47
CHIMERA S&P UAE UCITS ETF-D	6.08	5.01%	ARAM GROUP	1.45	-1.36%	RAK PROPERTIES	1.46	10815.47
ALKHALEEJ INVESTMENT	5.95	4.39%	ALPHA DHABI HOLDING PJSC	12.02	-1.31%	BANK OF SHARJAH	1.28	10408.49

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Qatar Stock Exchange

Close	11,022.14		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	80.43	0.74%	Total Return	#N/A Requesting Data	25,916.44	0.74%	1.28%	2.95%
Previous Close	10941.71		Rayan Islamic	5,236.66	5,209.32	0.52%	1.05%	2.38%
Open	10941.71		All Share	4,095.71	4,065.58	0.74%	1.39%	3.02%
			Banks & Finance	5,160.43	5,104.34	1.10%	1.88%	4.16%
Day's High	11022.14		Industrials	4,426.99	4,404.62	0.51%	1.23%	3.51%
Day's Low	10936.47		Transportation	5,793.15	5,772.08	0.37%	0.11%	-1.24%
YTD Change	0.04266824		Real Estate	1,677.85	1,672.60	0.31%	0.59%	2.45%
			Insurance	2,458.91	2,463.77	-0.20%	0.78%	-1.02%
Volume Mn	199.667		Telecommunications	2,163.85	2,156.98	0.32%	0.68%	-0.93%
Value Traded Mn	501.1812		Consumer Goods	8,309.28	8,311.10	-0.02%	0.65%	3.20%
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 GERMAN CO FOR MEDICAL	1.59	9.97%	MANNAI CORPORATION QPSC	6.80	-3.60%	QATAR GERMAN CO I	1.59	31489.83
WIDAM FOOD CO	2.32	5.17%	ZAD HOLDING CO	14.50	-0.82%	MESAIEED PETROCHEMICAL	1.36	26916.33
INMA HOLDING COMPANY	3.41	2.65%	QATAR EXCHANGE INDEX ETF	10.41	-0.67%	BALADNA	1.32	21340.47
COMMERCIAL BANK PSQC	4.65	1.95%	BALADNA	1.32	-0.60%	QATAR ALUMINUM MANUFACTURING	1.43	16478.29
QATAR ALUMINUM MANUFACTURING	1.43	1.86%	GULF INTERNATIONAL SERVICES	3.29	-0.45%	EZDAN HOLDING GROUP	1.12	12700.44

Bahrain Bourse

Close	1,937.70		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-6.65	-0.34%	MSCI Bahrain	164.80	164.88	-0.05%	-0.05%	2.22%
Previous Close	1,944.35		MSCI Bahrain Domestic Islamic	#N/A N/A	0.00	#VALUE!	#VALUE!	#VALUE!
Open	1,943.77		MSCI Bahrain Net TR USD	468.14	468.19	-0.01%	0.00%	2.30%
Day's High	1945.050							
Day's Low	1937.700							
YTD Change	-2.43%							
Volume Mn	2,936.83							
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
ZAIN BAHRAIN BSCC	0.12	2.50%	ITHMAAR HOLDING BSC	0.03	-9.38%	GFH FINANCIAL GROUP	0.35	87998.44
ARAB BANKING CORP BSC-\$US	0.36	0.57%	ALUMINIUM BAHRRAIN BSC	0.93	-1.69%	ITHMAAR HOLDING BSC	0.03	1200.00
-	-	-	GULF HOTEL GROUP B.S.C	0.43	-1.16%	AL SALAM BANK BSC	0.24	159.60
-	-	-	BAHRRAIN NATIONAL HOLDING	0.50	-0.59%	ZAIN BAHRRAIN BSCC	0.12	119.60
-	-	-	-	-	-	NATIONAL BANK OF BAHRAIN	0.50	114.69

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Boursa Kuwait

Close	8,611.27		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	9.14	0.11%	Industrials	693.39	679.43	2.05%	-3.55%	-4.18%
Previous Close	8,602.13		Banks	2,202.84	2,195.27	0.34%	1.88%	21.72%
Open	8,608.60		Consumer Service	1,304.49	1,344.56	-2.98%	-1.93%	30.62%
			Technology	1,971.52	1,818.75	8.40%	78.29%	89.51%
Day's High	8,627.12		Real Estate	1,783.74	1,805.18	-1.19%	0.83%	31.82%
Day's Low	8,589.23		Financial Services	1,619.46	1,615.63	0.24%	5.17%	7.21%
YTD Change	16.96%		Telecom	1,096.57	1,101.65	-0.46%	4.20%	7.75%
			Health Care	468.96	508.34	-7.75%	-17.68%	2.33%
Volume Mn	0.89		Insurance	1,921.60	1,991.72	-3.52%	1.01%	-6.50%
Value Traded Mn	127.25		Basic Materials	895.85	885.11	1.21%	4.72%	-1.69%
Traded / Listed Stocks	140	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
UNITED PROJECTS FOR AVIATION	310.00	115.28%	CREDIT RATING & COLLECTION	287.00	-28.25%	MANAZEL HOLDING	55.10	128861.53
SHUAIBA INDUSTRIAL CO	239.00	28.49%	AL SAFAT ENERGY HOLDING COMP	85.00	-12.37%	EKTTITAB HOLDING C	24.60	81844.56
AL MASAKEN INTL REAL ESTATE	62.60	14.44%	AL MAIDAN DENTAL CLINIC CO K	679.00	-9.47%	FIRST INVESTMENT C	86.00	39726.35
BAYAN INVESTMENT HOLDING CO	70.00	9.03%	WETHAQ TAKAFUL INSURANCE CO	116.00	-9.38%	ALIMTIAZ INVESTMEI	48.00	36532.35
AMAR FINANCE & LEASING CO	82.00	8.47%	DAR AL THURAYA REAL ESTATE C	247.00	-8.18%	ASIYA CAPITAL INVES	49.50	30214.46

Source: FSC