

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

24/02/2025



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	3,843.08	(1.3)	3.6	22.9	21.2	3.6	3.0	1.70%
MSCI Emerging Markets Index	1,147.30	1.3	6.7	14.7	15.1	1.8	1.7	2.64%
MSCI FM FRONTIER MARKETS	559.47	(0.4)	5.0	-	12.1	0.2	1.6	4.06%

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	602.03	(0.1)	5.7	11.3	13.9	1.7	1.7	3.88%
Muscat Stock Exchange MSX 30 Index	4,428.17	(0.6)	(3.2)	9.6	12.4	0.6	0.8	6.20%
Tadawul All Share Index	12,392.92	0.0	3.0	20.0	22.2	2.4	2.3	3.59%
Dubai Financial Market General Index	5,342.29	(0.3)	3.6	9.4	11.3	1.5	1.1	4.53%
FTSE ADX GENERAL INDEX	9,606.13	(0.1)	2.0	17.2	21.5	2.6	2.3	2.10%
Qatar Exchange Index	10,665.97	0.2	0.9	11.7	14.1	1.3	1.5	4.07%
Bahrain Bourse All Share Index	1,949.79	0.3	(1.8)	15.7	11.1	1.3	0.9	3.74%
Boursa Kuwait All Share Price Return Ir	8,101.19	0.1	10.0	21.0	20.8	1.9	1.5	26.49%

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	601.99	1.4	5.7	16.2	17.0	1.8	1.7	2.58%
MSCI AC Asia Ex. Japan Index	746.90	1.8	6.1	15.8	16.8	1.8	1.7	0.00%
Nikkei 225	38,776.94	0.3	(2.8)	19.9	25.5	2.1	1.9	1.79%
S&P/ASX 200	8,308.24	0.1	1.8	21.3	19.2	2.4	2.2	3.67%
Hang Seng Index	23,341.61	(0.6)	16.4	11.7	11.0	1.3	1.1	3.59%
NSE Nifty 50 Index	22,553.35	(1.1)	(4.6)	21.3	23.9	3.4	3.3	1.42%

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	185.79	0.5	9.4	16.3	16.2	2.2	1.9	3.10%
MSCI Emerging Markets Europe Index	133.18	(0.7)	12.5	7.7	7.1	1.2	1.0	3.74%
FTSE 100 Index	8,686.82	0.3	6.3	14.3	13.9	2.0	1.7	3.60%
Deutsche Boerse AG German Stock Inc	22,496.74	0.9	13.0	18.6	15.4	2.0	1.6	2.52%
CAC 40	8,141.29	(0.2)	10.3	17.0	16.1	2.0	1.8	3.02%

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	5,961.57	(1.8)	2.3	27.1	23.8	5.0	4.2	1.30%
S&P 500 INDEX	6,013.13	(1.7)	2.2	27.1	23.7	5.2	4.3	1.26%
Dow Jones Industrial Average	43,428.02	(1.7)	2.1	23.9	21.3	5.7	4.7	1.63%
NASDAQ Composite Index	19,524.01	(2.2)	1.1	41.0	38.9	7.2	6.0	0.67%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	569.40	-1.6	3.6	-31%	149%
Gold Spot \$/Oz	2,939.73	0.1	12.0	0%	180%
BRENT CRUDE FUTR Apr25	74.68	0.3	0.6	-12%	61%
Generic 1st'OQA' Future	76.30	-0.8	0.3	-39%	313%
LME COPPER 3MO (\$)	9,559.00	0.0	9.0	-12%	121%
SILVER SPOT \$/OZ	32.50	0.1	12.4	-7%	171%

Source: FSC

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Muscat Stock Exchange

Close	4,428.17		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-26.64	-0.60%						
Previous Close	4,454.81		Financial Sector	7,700.58	7,732.29	-0.41%	-1.58%	-0.33%
Open	4,454.81		Industry Sector	5,820.08	5,666.33	2.71%	7.59%	10.42%
Day's High	4,466.39		Services Sector	1,631.01	1,655.06	-1.45%	-3.62%	-6.43%
Day's Low	4,428.17							
YTD Change	-3.24%							
Volume Mn	12.42							
MSX30 Value Traded Mn	2.73							
Traded Securities	52							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN CEMENT	0.510	13.08%	RENAISSANCE SERVICES	0.353	-4.59%	OQ EXPLORATION AN	0.312	2845.15
AL ANWAR CERAMIC	0.121	9.01%	SEMBCORP SALALAH	0.090	-3.23%	OQ GAS NETWORKS	0.129	1603.19
MUSCAT THREAD MILLS	0.151	7.09%	OMAN TELECOM	0.835	-2.91%	AL SUWADI POWER	0.066	1320.09
NATIONAL FINANCE	0.132	3.13%	AHLI BANK	0.168	-2.89%	SMN POWER HOLDIN	0.341	1258.21
VOLTAMP ENERGY	0.595	2.41%	OQ GAS NETWORKS	0.129	-2.27%	BANK MUSCAT	0.254	1046.36

Saudi Exchange

Close	12,392.92		Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	4.77	0.04%	Tadawul Banks	13,032.61	12,946.30	0.67%	0.67%	2.53%
Previous Close	12,388.15		Tadawul Energy	5,226.29	5,254.47	-0.54%	-0.54%	-0.86%
Open	12,374.42		Tadawul Utilities	13,833.19	13,612.82	1.62%	1.62%	-0.93%
Day's High	12,430.20		Tadawul Telecom	8,940.24	8,910.17	0.34%	0.34%	5.20%
Day's Low	12,357.35		Tadawul Insurance	10,193.74	10,324.72	-1.27%	-1.27%	-5.67%
YTD Change	2.96%		Tadawul Retailing	7,962.73	7,977.22	-0.18%	-0.18%	-0.27%
			Tadawul Food & Beverages	6,039.78	6,059.64	-0.33%	-0.33%	-2.58%
Volume Mn	261,651.80		Tadawul Media	26,842.56	27,050.20	-0.77%	-0.77%	-14.78%
Value Traded Mn	5,787.39		Tadawul Materials	5,440.65	5,501.88	-1.11%	-1.11%	-2.66%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	15,707.54	15,708.86	-0.01%	-0.01%	-0.90%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
ARAB NATIONAL BANK	22.36	2.95%	CHUBB ARABIA COOPERATIVE INS	48.75	-6.25%	SAUDI ARABIAN OIL C	27.55	11330.01
AL-HASSAN G.I. SHAKER CO	31.8	2.75%	NASEEJ INTERNATIONAL TRADING	95.60	-5.72%	TOURISM ENTERPRIS	0.90	10129.83
ASTRA INDUSTRIAL GROUP	186.6	2.53%	THE NATIONAL AGRICULTURE DEV	25.55	-5.19%	AL-BAHA DEVELOPMI	0.43	8953.00
ELM CO	1106.8	2.48%	ADVANCED PETROCHEMICALS CO	28.65	-4.18%	THE SAUDI NATIONAL	36.35	8495.12
AL MASANE AL KOBRA MINING CO	63.1	2.27%	AL KHALEEJ TRAINING AND EDUC	31.00	-4.02%	MOBILE TELECOMML	11.52	6591.53

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,342.29							
Change	-16.96	-0.32%						
Previous Close	5,359.25		Real Estate & Construction	10,133.00	10,133.00	-0.01%	-0.01%	-0.03%
Open	5,360.02		Banking	10,133.00	10,133.00	1.08%	1.08%	-1.87%
			Investment and Financial	10,133.00	10,133.00	-1.74%	-1.74%	-19.89%
Day's High	5,387.32		Insurance	10,133.00	10,133.00	1.47%	1.47%	3.05%
Day's Low	5,340.13		Consumer Staples	10,133.00	10,133.00	-0.67%	-0.67%	-2.94%
YTD Change	0.04		Services	10,133.00	10,133.00	0.65%	0.65%	0.00%
			Industrial	10,133.00	10,133.00	-1.99%	-1.99%	0.17%
Volume Mn	256,075.93		Telecommunication	10,133.00	10,133.00	-0.94%	-0.94%	-10.84%
Value Traded Mn	500.74		Transportation	10,133.00	10,133.00	0.53%	0.53%	19.18%
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	0.239	5.29%	DUBAI ISLAMIC INSURANCE CO	0.367	-4.68%	DRAKE & SCULL INTEI	0.35	71,779.64
DUBAI ELECTRICITY & WATER AU	2.65	1.53%	DUBAI REFRESHMENTS COMPANY	19.05	-2.31%	UNION PROPERTIES F	0.47	45,323.35
DRAKE & SCULL INTERNATIONAL	0.348	1.46%	NATIONAL CEMENT CO	3.35	-1.76%	DUBAI FINANCIAL M/	1.44	15,332.06
AL SALAM BANK SUDAN	0.677	1.35%	AMLAK FINANCE	0.845	-1.74%	SHUAA CAPITAL PSC	0.24	11,761.35
GULF NAVIGATION HOLDING PJSC	5.33	0.76%	AIR ARABIA PJSC	3.43	-1.72%	DEYAAR DEVELOPME	0.93	11,210.11

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,606.13							
Change	-12.21	-0.13%						
Previous Close	9,618.34		Financial	17,161.51	17,162.46	-0.01%	-0.01%	-0.03%
Open	9,618.34		Telecommunication	4,121.15	4,076.94	1.08%	1.08%	-1.87%
Day's High	9,644.51		Consumer Services	10,022.62	10,200.34	-1.74%	-1.74%	-19.89%
Day's Low	9,606.13		Basic Material	4,807.85	4,738.29	1.47%	1.47%	3.05%
YTD Change	1.99%		Industrials	2,615.93	2,633.63	-0.67%	-0.67%	-2.94%
			Utilities	12,395.79	12,316.33	0.65%	0.65%	0.00%
Volume Mn	292,412.33		Energy	2,276.45	2,322.63	-1.99%	-1.99%	0.17%
Value Traded Mn	1,107.88		Health Care	2,270.35	2,292.00	-0.94%	-0.94%	-10.84%
Traded / Listed Stocks	73	84	Real Estate	13,434.22	13,363.63	0.53%	0.53%	19.18%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
AL WATHBA NATIONAL INSURANCE	3.45	15.00%	AMERICANA RESTAURANTS INTERN	2.44	-5.79%	MULTIPLY GROUP	1.95	20235.43
EASY LEASE MOTOR CYCLE PJSC	34.3	10.08%	HILY HOLDING PJSC	2.79	-5.74%	ESHRAQ INVESTMEN	0.34	16630.93
HAYAH INSURANCE CO PJSC	1.52	8.57%	PALMS SPORTS P.J.S.C	7.68	-5.19%	ALDAR PROPERTIES P	9.24	16543.44
BOROUGE	2.62	2.75%	ABU DHABI COMMERCIAL BANK	11.38	-3.72%	ABU DHABI NATIONA	0.59	13717.92
ALKHALEJ INVESTMENT	4.35	2.35%	ABU DHABI AVIATION CO	6.13	-3.62%	BOROUGE	2.62	13368.80

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Qatar Stock Exchange

Close	10,665.97		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	24.88	0.23%	Total Return	24,472.04	24,310.20	0.67%	0.54%	0.60%
Previous Close	10641.09		Rayan Islamic	4,939.71	4,926.77	0.26%	0.16%	-0.14%
Open	10641.09		All Share	3,811.68	3,789.88	0.58%	0.44%	0.46%
			Banks & Finance	4,721.43	4,679.61	0.89%	0.82%	1.95%
Day's High	10666.04		Industrials	4,314.51	4,293.39	0.49%	0.52%	-1.52%
Day's Low	10547.25		Transportation	5,334.15	5,283.76	0.95%	0.70%	1.56%
YTD Change	0.008975412		Real Estate	1,596.01	1,606.51	-0.65%	-1.00%	-1.77%
			Insurance	2,296.07	2,303.62	-0.33%	-1.53%	-4.41%
Volume Mn	195.175		Telecommunications	1,986.98	1,990.41	-0.17%	-0.03%	-1.39%
Value Traded Mn	595.4604		Consumer Goods	7,802.67	7,825.56	-0.29%	-0.77%	-0.47%
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 ELECTRICITY & WATER CO	15.40	2.12%	ESTITHMAR HOLDING QPSC	2.00	-7.83%	ESTITHMAR HOLDING	2.00	36875.28
QATAR GAS TRANSPORT(NAKILAT)	4.48	1.54%	ALIJARAH HOLDING COMPANY QPS	0.73	-6.19%	BALADNA	1.27	20311.93
INDUSTRIES QATAR	13.57	1.27%	QATAR ALUMINUM MANUFACTURING	1.29	-4.30%	QATAR ALUMINUM M	1.29	19953.54
QATAR ISLAMIC BANK	21.70	1.21%	QATAR GERMAN CO FOR MEDICAL	1.31	-2.61%	EZDAN HOLDING GR	0.99	14345.26
AL AHLI BANK	3.65	0.83%	BALADNA	1.27	-2.08%	ALIJARAH HOLDING C	0.73	10481.05

Bahrain Bourse

Close	1,949.79		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	6.36	0.33%	MSCI Bahrain	155.94	155.90	0.03%	0.03%	1.80%
Previous Close	1,943.43		MSCI Bahrain Domestic Islamic	60.90	60.88	0.03%	0.03%	1.20%
Open	1,943.43		MSCI Bahrain Net TR USD	425.81	425.81	0.00%	0.00%	1.80%
Day's High	1950.120							
Day's Low	1943.430							
YTD Change	-1.82%							
Volume Mn	55,546.28							
Value Traded Mn	11.363							
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
GFH FINANCIAL GROUP BSC	0.33	5.13%	-	-	-	AL SALAM BANK BSC	0.21	828.29
APM TERMINALS BAHRAIN BSC	1.19	0.85%	-	-	-	GFH FINANCIAL GRO	0.33	355.13
NATIONAL BANK OF BAHRAIN BSC	0.49	0.21%	-	-	-	SEEF PROPERTIES	0.12	50.00
-	-	-	-	-	-	ALUMINIUM BAHRAI	1.13	33.62
-	-	-	-	-	-	APM TERMINALS BA	1.19	16.41

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Boursa Kuwait

Close	8,101.19		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	9.27	0.11%	Industrials	762.84	759.98	0.38%	3.58%	5.42%
Previous Close	8,091.92		Banks	2,029.00	2,033.44	-0.22%	4.48%	12.11%
Open	8,094.56		Consumer Service	1,036.40	1,036.74	-0.03%	0.47%	3.78%
			Technology	1,615.05	1,542.30	4.72%	54.17%	55.25%
Day's High	8,120.25		Real Estate	1,562.54	1,551.35	0.72%	3.98%	15.48%
Day's Low	8,080.17		Financial Services	1,568.77	1,549.43	1.25%	1.99%	3.85%
YTD Change	10.03%		Telecom	1,068.90	1,067.93	0.09%	5.50%	5.03%
			Health Care	519.30	519.30	0.00%	12.01%	13.31%
Volume Mn	0.34		Insurance	2,064.77	2,072.94	-0.39%	1.12%	0.46%
Value Traded Mn	96.51		Basic Materials	931.90	922.66	1.00%	5.74%	2.27%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
UNICAP INVESTMENT AND FINANC	290.00	7.81%	KUWAIT REAL ESTATE HOLDING C	37.70	-5.28%	KUWAIT BUSINESS TC	171.00	49377.37
ENERGY HOUSE HOLDING CO KSCP	252.00	6.78%	GULF FRANCHISING HOLDING CO	82.00	-4.87%	KUWAIT PROJECTS HI	99.00	25612.74
AJIAL REAL ESTATE ENTMT	305.00	6.27%	OSOS HOLDING GROUP CO	126.00	-4.55%	BURGAN BANK	226.00	19676.49
EKTITAB HOLDING CO SAK	15.40	5.48%	AL TAMDEEN INVESTMENT CO	672.00	-4.00%	KUWAIT FINANCE HC	801.00	17214.43
REAL ESTATE TRADE CENTERS CO	55.00	4.76%	MUNSHAAT REAL ESTATE PROJECT	160.00	-3.61%	ARZAN FINANCIAL GF	298.00	16107.46

Source: FSC