

Financial Services Company
GCC Daily Report

2025

Research Department

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FSC Daily Report

26/03/2025



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	3,746.87	0.3	1.1	21.8	21.3	3.6	3.0	1.76%
MSCI Emerging Markets Index	1,129.41	(0.6)	5.0	15.2	15.2	1.8	1.7	2.70%
MSCI FM FRONTIER MARKETS	574.58	0.1	7.9	-	12.1	1.6	1.6	4.15%

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	583.20	(0.1)	2.4	10.8	13.9	1.6	1.7	4.20%
Muscat Stock Exchange MSX 30 Index	4,397.28	(0.3)	(3.9)	9.7	12.5	0.9	0.8	5.93%
Tadawul All Share Index	11,918.31	1.8	(1.0)	17.9	22.2	2.3	2.3	3.69%
Dubai Financial Market General Index	5,102.02	(0.3)	(1.1)	9.1	11.3	1.4	1.1	4.82%
FTSE ADX GENERAL INDEX	9,374.40	0.3	(0.5)	20.8	21.7	2.5	2.4	2.28%
Qatar Exchange Index	10,188.06	0.3	(3.6)	11.1	14.1	1.2	1.5	4.93%
Bahrain Bourse All Share Index	1,950.62	(0.4)	(1.8)	14.5	11.2	1.3	0.9	9.09%
Boursa Kuwait All Share Price Return Ir	8,066.49	(0.2)	9.6	17.0	20.9	2.0	1.6	2.93%

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	587.64	(0.6)	3.2	16.1	17.0	1.9	1.7	2.66%
MSCI AC Asia Ex. Japan Index	732.88	(0.8)	4.1	15.7	16.8	1.8	1.7	0.00%
Nikkei 225	38,027.29	0.7	(4.7)	19.3	25.5	2.0	1.9	1.83%
S&P/ASX 200	7,998.97	0.7	(2.0)	19.9	19.3	2.2	2.2	3.69%
Hang Seng Index	23,483.32	0.6	17.1	11.6	11.0	1.3	1.1	3.70%
NSE Nifty 50 Index	23,486.85	(0.8)	(0.7)	22.0	23.9	3.5	3.3	1.37%

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	185.14	0.7	9.0	15.4	16.3	2.2	2.0	3.08%
MSCI Emerging Markets Europe Index	142.98	1.5	20.8	10.5	7.2	1.3	1.0	3.49%
FTSE 100 Index	8,660.93	(0.0)	6.0	13.1	14.1	2.0	1.8	3.61%
Deutsche Boerse AG German Stock Inc	22,898.51	(0.9)	15.0	16.7	15.5	1.9	1.7	2.45%
CAC 40	8,037.38	(0.9)	8.9	16.3	16.1	2.0	1.8	3.06%

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	5,729.80	0.2	(1.6)	24.8	23.9	4.7	4.2	1.36%
S&P 500 INDEX	5,776.65	0.2	(1.8)	24.7	23.8	5.0	4.4	1.32%
Dow Jones Industrial Average	42,587.50	0.0	0.1	22.4	21.4	5.5	4.7	1.67%
NASDAQ Composite Index	18,271.86	0.5	(5.4)	34.5	39.1	6.6	6.0	0.72%

Commodities	Last price	% Chg, 1 Day	% chg, YTD	% chg from 10 year high	% chg from 10 year Low
S&P GSCI Index Spot	560.08	0.0	1.9	-32%	145%
Gold Spot \$/Oz	3,021.46	0.0	15.1	-1%	187%
BRENT CRUDE FUTR May25	73.45	0.6	-0.6	-13%	58%
Generic 1st'OQA' Future	74.51	0.2	-2.0	-41%	304%
LME COPPER 3MO (\$)	10,112.00	1.6	15.3	-7%	133%
SILVER SPOT \$/OZ	33.76	0.1	16.8	-3%	182%

Source: FSC

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Muscat Stock Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	4,397.28							
Change	-11.05	-0.25%						
Previous Close	4,408.33		Financial Sector	7,713.70	7,733.61	-0.26%	-0.34%	-0.16%
Open	4,408.33		Industry Sector	5,448.96	5,509.27	-1.09%	-6.57%	3.38%
Day's High	4,414.70		Services Sector	1,600.10	1,600.87	-0.05%	-2.01%	-8.20%
Day's Low	4,392.03							
YTD Change	-3.92%							
Volume Mn	25.59							
MSX30 Value Traded Mn	5.15							
Traded Securities	50							

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	OMR	%		OMR	%	Companies	OMR	000
OMAN FISHERIES	0.029	7.41%	MADINA TAKAFUL	0.077	-8.33%	SOHAR INTERNATION	0.136	3856.52
MUSCAT GASES	0.095	5.56%	UNITED FINANCE	0.058	-7.94%	BANK MUSCAT	0.266	3853.00
OMAN ARAB BANK	0.146	4.29%	OMAN CABLES INDUSTRY	2.150	-7.33%	OQ BASE INDUSTRIES	0.103	2353.82
BARKA DESALINATION	0.125	3.31%	OMAN UNITED INSURANCE	0.225	-6.25%	OQ GAS NETWORKS	0.133	2320.05
AL SHARQIYA INVESTMENT HO.	0.073	2.82%	ALIAZEERA SERVICES	0.170	-5.56%	ALBATINAH POWER	0.067	2290.24

Saudi Exchange

			Main - Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	11,918.31							
Change	212.10	1.81%	Tadawul Banks	13,101.02	12,788.63	2.44%	1.26%	2.37%
Previous Close	11,706.21		Tadawul Energy	5,048.51	4,954.46	1.90%	3.38%	-1.82%
Open	11,727.88		Tadawul Utilities	11,731.48	11,596.40	1.16%	2.08%	-8.89%
Day's High	11,925.71		Tadawul Telecom	8,768.61	8,605.13	1.90%	0.77%	-1.40%
Day's Low	11,727.88		Tadawul Insurance	9,327.45	9,329.88	-0.03%	-1.75%	-7.65%
YTD Change	-0.98%		Tadawul Retailing	7,713.61	7,594.67	1.57%	0.77%	-2.30%
			Tadawul Food & Beverages	5,590.61	5,510.87	1.45%	-0.72%	-5.69%
Volume Mn	179,836.66		Tadawul Media	22,148.82	21,930.83	0.99%	1.02%	-13.18%
Value Traded Mn	3,653.41		Tadawul Materials	5,219.54	5,152.29	1.31%	1.12%	-0.15%
Traded / Listed Stocks	246	228	Tadawul Capital Goods	13,623.86	13,537.29	0.64%	0.54%	-10.61%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	SAR	%		SAR	%	Companies		000
AL-BAHA DEVELOPMENT & INVEST	0.38	8.57%	AL JOUF MINERAL WATER BOTTLI	1.75	-9.33%	AL-BAHA DEVELOPMI	0.38	42117.46
AL HASOOB CO	62.8	8.28%	MOBI INDUSTRY CO	15.10	-4.43%	SAUDI ARABIAN OIL C	26.60	7188.54
ALWASAIL INDUSTRIAL CO	3.24	6.58%	GULF GENERAL COOPERATIVE INS	8.98	-2.81%	TOURISM ENTERPRIS	0.81	4935.15
SAUDI CHEMICAL CO HOLDING	8.79	5.65%	CO FOR COOPERATIVE INSURANCE	137.40	-2.41%	THE SAUDI NATIONAL	35.75	4087.66
ALLIED COOPERATIVE INSURANCE	13.38	5.35%	ASTRA INDUSTRIAL GROUP	150.60	-1.57%	ARAB NATIONAL BAN	23.00	3806.96

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Dubai Financial Market

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	5,102.02							
Change	-15.09	-0.29%						
Previous Close	5,117.11		Real Estate & Construction	49,424.00	49,424.00	0.00%	0.00%	0.00%
Open	5,099.32		Banking	49,424.00	49,424.00	0.00%	0.00%	0.00%
			Investment and Financial	49,424.00	49,424.00	0.00%	0.00%	0.00%
Day's High	5,122.76		Insurance	49,424.00	49,424.00	0.00%	0.00%	0.00%
Day's Low	5,089.78		Consumer Staples	49,424.00	49,424.00	0.00%	0.00%	0.00%
YTD Change	-0.01		Services	49,424.00	49,424.00	0.00%	0.00%	0.00%
			Industrial	49,424.00	49,424.00	0.00%	0.00%	0.00%
Volume Mn	75,572.40		Telecommunication	49,424.00	49,424.00	0.00%	0.00%	0.00%
Value Traded Mn	378.77		Transportation	49,424.00	49,424.00	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
DUBAI REFRESHMENTS COMPANY	23	15.00%	AIR ARABIA PJSC	3.19	-8.33%	DUBAI ELECTRICITY &	2.50	20,845.55
EMIRATES INVESTMENT BANK	80	10.65%	EMIRATES INTEGRATED TELECOMM	7.9	-3.66%	AJMAN BANK PJSC	1.58	19,688.44
AL SALAM BANK SUDAN	0.69	3.76%	BHM CAPITAL FINANCIAL SERVIC	1.7	-2.30%	DRAKE & SCULL INTEI	0.35	10,284.55
TABREED	2.69	2.67%	ISLAMIC ARAB INSURANCE COM	0.39	-2.26%	EMAAR PROPERTIES I	13.45	5,554.18
EMIRATES NBD PJSC	20.3	2.53%	GULF NAVIGATION HOLDING PJSC	5.16	-1.90%	AIR ARABIA PJSC	3.19	5,320.66

Abu Dhabi Securities Exchange

			Sub Sectors	Current	Previous	DTD	MTD	YTD
Close	9,374.40							
Change	31.98	0.34%						
Previous Close	9,342.42		Financial	16,847.68	16,799.90	0.28%	0.05%	-1.82%
Open	9,342.42		Telecommunication	4,223.34	4,219.96	0.08%	-1.62%	3.09%
Day's High	9,376.86		Consumer Services	8,828.71	8,957.68	-1.44%	-4.83%	-9.32%
Day's Low	9,335.50		Basic Material	4,452.60	4,397.97	1.24%	2.73%	-7.71%
YTD Change	-0.47%		Industrials	2,512.11	2,497.85	0.57%	0.58%	-2.78%
			Utilities	12,514.98	12,395.79	0.96%	0.64%	3.62%
Volume Mn	265,942.27		Energy	2,193.75	2,172.70	0.97%	1.35%	-3.02%
Value Traded Mn	1,033.69		Health Care	2,077.18	2,110.50	-1.58%	-0.70%	-6.81%
Traded / Listed Stocks	76	84	Real Estate	12,532.66	12,498.42	0.27%	1.61%	-3.78%

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
	AED	%		AED	%	Companies	AED	000
SHARJAH CEMENT & INDUS DEVEL	0.79	5.90%	GULF MEDICAL PROJECTS	2.01	-6.51%	MULTIPLY GROUP	1.60	39955.88
PALMS SPORTS P.J.S.C	6.71	3.71%	ESHRAQ INVESTMENTS PJSC	0.376	-2.08%	ESHRAQ INVESTMEN'	0.38	17816.95
APEX INVESTMENT CO PSC	3.91	3.17%	EMIRATES INSURANCE CO. (PSC)	7.45	-1.97%	FIRST ABU DHABI BAI	13.66	15207.51
ESG EMIRATES STALLIONS GROU	8.44	2.93%	AGTHIA GROUP PJSC	4.15	-1.89%	ABU DHABI NATIONA	0.54	9165.75
ABU DHABI COMMERCIAL BANK	10.98	2.62%	SUDATEL TELECOM GROUP LTD	0.322	-1.83%	BOROUGE	2.44	8145.38

Source: FSC

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Qatar Stock Exchange

Close	10,188.06		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	30.50	0.30%	Total Return	23,974.21	23,902.45	0.30%	-1.14%	-1.42%
Previous Close	10157.56		Rayan Islamic	4,867.69	4,839.70	0.58%	-0.74%	-0.53%
Open	10157.56		All Share	3,735.72	3,726.12	0.26%	-1.13%	-1.61%
			Banks & Finance	4,555.97	4,543.41	0.28%	-1.09%	-2.79%
Day's High	10216.19		Industrials	4,262.19	4,241.26	0.49%	-1.39%	-1.44%
Day's Low	10125.18		Transportation	5,554.56	5,605.09	-0.90%	-0.74%	2.34%
YTD Change	-0.03623375		Real Estate	1,572.06	1,565.66	0.41%	-1.16%	0.07%
			Insurance	2,247.34	2,252.96	-0.25%	-2.52%	-3.61%
Volume Mn	126.534		Telecommunications	1,944.75	1,926.06	0.97%	-1.52%	-0.72%
Value Traded Mn	337.8916		Consumer Goods	7,814.29	7,777.30	0.48%	-0.25%	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 GERMAN CO FOR MEDICAL	1.39	6.03%	DLALA HOLDING	1.01	-1.84%	AL RAYAN BANK	2.34	15021.84
ESTITHMAR HOLDING QPSC	2.35	1.64%	MEKDAM HOLDING GROUP	2.89	-1.70%	QATAR GERMAN CO I	1.39	14756.02
AL RAYAN BANK	2.34	1.43%	QATAR GAS TRANSPORT(NAKILAT)	4.65	-1.04%	QATAR ALUMINIUM N	1.28	12153.07
INMA HOLDING COMPANY	3.53	1.38%	QATAR NAVIGATION	10.65	-0.75%	MESAIEED PETROCHE	1.43	11877.60
QATAR INTERNATIONAL ISLAMIC	10.23	1.29%	QATAR INSURANCE CO	1.85	-0.70%	EZDAN HOLDING GRC	0.99	11512.37

Bahrain Bourse

Close	1,950.62		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-6.87	-0.35%	MSCI Bahrain	157.12	157.93	-0.51%	-1.19%	-0.75%
Previous Close	1,957.49		MSCI Bahrain Domestic Islamic	61.17	61.56	-0.64%	-1.73%	-1.68%
Open	1,957.49		MSCI Bahrain Net TR USD	438.87	435.21	0.84%	0.74%	1.51%
Day's High	1957.490							
Day's Low	1948.830							
YTD Change	-1.78%							
Volume Mn	1,089.44							
Value Traded Mn	0.697							
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	0.13	10.00%	GFH FINANCIAL GROUP BSC	0.31	-2.56%	AL SALAM BANK BSC	0.20	678.32
AL SALAM BANK BSC	0.20	0.51%	NATIONAL BANK OF BAHRAIN BSC	0.49	-1.41%	NATIONAL BANK OF I	0.49	305.99
ALUMINIUM BAHRAIN BSC	1.12	0.09%	BBK BSC	0.50	-0.99%	GFH FINANCIAL GRO	0.31	75.00
-	-	-	-	-	-	SEEF PROPERTIES	0.13	22.67
-	-	-	-	-	-	ALUMINIUM BAHRAI	1.12	10.40

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Boursa Kuwait

Close	8,066.49		Sub Sectors	Current	Previous	DTD	MTD	YTD
Change	-17.45	-0.22%	Industrials	741.17	746.39	-0.70%	-2.84%	2.42%
Previous Close	8,083.94		Banks	2,049.12	2,058.67	-0.46%	0.99%	13.22%
Open	8,086.86		Consumer Service	980.20	977.12	0.32%	-5.42%	-1.85%
			Technology	1,091.25	1,091.25	0.00%	-32.43%	4.90%
Day's High	8,096.85		Real Estate	1,507.99	1,500.54	0.50%	-3.49%	11.45%
Day's Low	8,054.83		Financial Services	1,507.97	1,499.77	0.55%	-3.88%	-0.17%
YTD Change	9.56%		Telecom	1,036.07	1,035.31	0.07%	-3.07%	1.80%
			Health Care	570.91	570.91	0.00%	9.94%	24.57%
Volume Mn	0.25		Insurance	2,115.81	2,110.01	0.27%	2.47%	2.95%
Value Traded Mn	91.50		Basic Materials	886.05	885.95	0.01%	-4.92%	-2.77%
Traded / Listed Stocks	159	159						

Source: FSC

Top Five Gainers	Price	Chg	Top Five Losers	Price	Chg	Top Five - Volume	Price	Volume
FIRST TAKAFUL INSURANCE CO	192.00	10.34%	OSOS HOLDING GROUP CO	121.00	-9.02%	KUWAIT REAL ESTATE	338.00	56247.63
NATIONAL INTERNATIONAL CO	171.00	5.56%	ALARGAN INTERNATIONAL REAL	93.40	-6.60%	WARBA BANK KSCP	223.00	23180.65
FIRST INVESTMENT CO KSCC	41.10	4.58%	KUWAIT FOUNDRY CO SAK	587.00	-5.17%	GULF BANK	355.00	16954.02
AL ARABI GROUP HOLDING CO	381.00	4.38%	NATIONAL INDUSTRIES CO KSC	230.00	-4.96%	NATIONAL BANK OF I	1052.00	11682.58
WETHAQ TAKAFUL INSURANCE CO	39.90	3.64%	COMBINED GROUP CONTRACTING	675.00	-4.66%	KUWAIT BUSINESS TC	117.00	10411.69

Source: FSC