

## MENA Markets Daily Report

February 17, 2025

		Country	Benchmark		Index Value	DTD Change	YTD % 2025	2024 % Change
MENA Countries								
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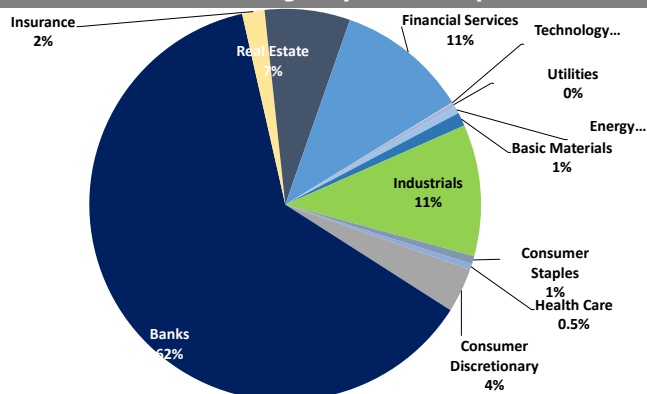
Source: Bloomberg &amp; Kamco Research. Note : Data as of last trading day.

Investment Strategy & Research  
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Tel: (965) 2233 6600, Extn: 6982/6912  
Fax: (965) 2249 2395<http://www.kamcoinvest.com>Kamco Investment Company - K.S.C  
(Public)

## Boursa Kuwait Daily Report

February 17, 2025

## Sector Weight by Market Cap



## Top 10 Companies by Market Capitalization

Company Name	Market Cap. (Mn KWD)	P/E (X)	ROE* (%)
1- Kuwait Finance House	12,556.7	20.7	11.3%
2- National Bank of Kuwait	8,384.7	14.3	14.7%
3- Boubayan Bank	2,755.7	29.7	10.5%
4- ALAFCO Aviation Lease & Finance Co.	2,467.0	NM	8.1%
5- Zain	2,090.0	12.4	14.7%
6- Commercial Bank of Kuwait	1,398.1	13.9	14.9%
7- Gulf Bank	1,277.6	22.2	7.1%
8- Mabanee Co.	1,124.5	16.9	10.2%
9- Ahli Bank of Kuwait	785.3	15.3	8.4%
10- Burgan Bank	770.9	16.5	5.4%
Total	33,611	18.72	11.8%

\*: ROE is calculated based on TTM 9M-2024 net profit &amp; shareholders' equity as of 30-September-24

## Top Movers and Most Active Stocks

Today's Top % Gainers	Close (KWD)	Change (KWD)	Percent Change
First Takaful Insurance Co.	0.217	0.044	25.4%
Kuwait Hotels Co.	0.270	0.039	16.9%
The Energy House Co.	0.295	0.036	13.9%
Automated Systems Co.	0.182	0.021	13.0%
Al-Maidan Clinic For Oral Health Serv. Co.	0.680	0.061	9.9%




Today's Top % Losers	Close (KWD)	Change (KWD)	Percent Change
Tamdeen Investment Co.	0.697	(0.073)	(9.5%)
Kuwait Real Estate Holding Co.	0.039	(0.003)	(7.1%)
Al-Argan International Real Estate Co.	0.108	(0.006)	(5.3%)
Kuwait & M.E. Financial Inv. Co.	0.151	(0.007)	(4.4%)
Hayat Communications Co.	0.067	(0.003)	(4.1%)

Today's Most Active by Volume	Close (KWD)	Percent Change	Volume (Shares)
Oula Fuel Marketing Co.	0.711	5.3%	153,002,540
Kuwait Business Town Real Estate Co.	0.164	2.5%	95,031,975
Arzan Financial Group For Fin. & Invest.	0.287	1.1%	56,441,947
GFH Financial Group	0.095	(3.4%)	25,112,798
Privatization Holding Co.	0.055	3.8%	24,037,963

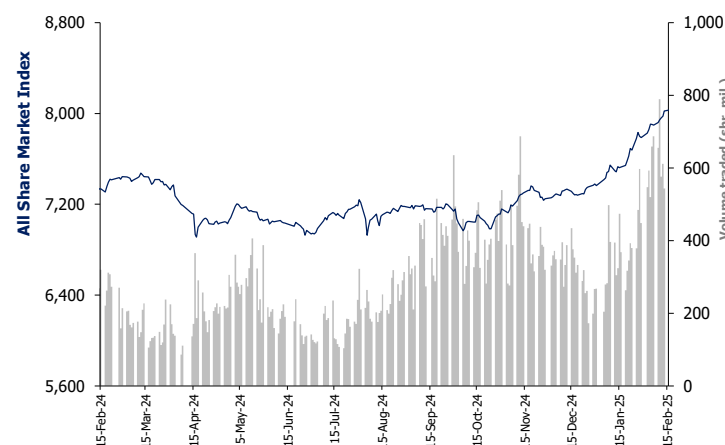
Source: Boursa Kuwait, Kamco Invest Research

## Sector Returns

	Index Close	DTD ▲	DTD % Chg	MTD % Chg	YTD % Chg
All Share Market Index	8,027.9	▲	0.1%	3.1%	9.0%
Energy	1,365.4	▲	0.2%	2.8%	14.8%
Basic Materials	916.7	▼	(0.3%)	4.0%	0.6%
Industrials	750.4	▲	0.1%	1.9%	3.7%
Consumer Staples	1,048.0	▲	0.2%	1.6%	4.9%
Health Care	444.2	▲	6.2%	(4.2%)	(3.1%)
Consumer Discretionary	2,509.3	▲	1.1%	9.9%	18.2%
Telecommunications	1,060.6	▼	(0.4%)	4.7%	4.2%
Banks	2,003.9	▲	0.1%	3.2%	10.7%
Insurance	2,148.9	▲	2.9%	5.2%	4.6%
Real Estate	1,538.3	▲	0.0%	2.4%	13.7%
Financial Services	1,550.2	▼	(0.7%)	0.8%	2.6%
Technology	1,324.1	▲	13.0%	26.4%	27.3%
Utilities	407.9	▼	(0.6%)	2.0%	2.6%

Market Breadth		55		61		27
Benchmark Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD % Chg	
Premier Market Index	8,567.87	(0.7)	(0.0%)	3.2%	9.3%	
Main 50 Index	7,547.44	55.3	0.7%	3.8%	10.9%	
Main Market Index	7,452.95	48.7	0.7%	2.7%	7.9%	
All Share Market Index	8,027.94	8.9	0.1%	3.1%	9.0%	
Market Cap (KWD Mn)	49,411.60	50.5	0.1%	7.6%	13.8%	

## Index Performance relative to Volume



## Market Trading Data and Volatility

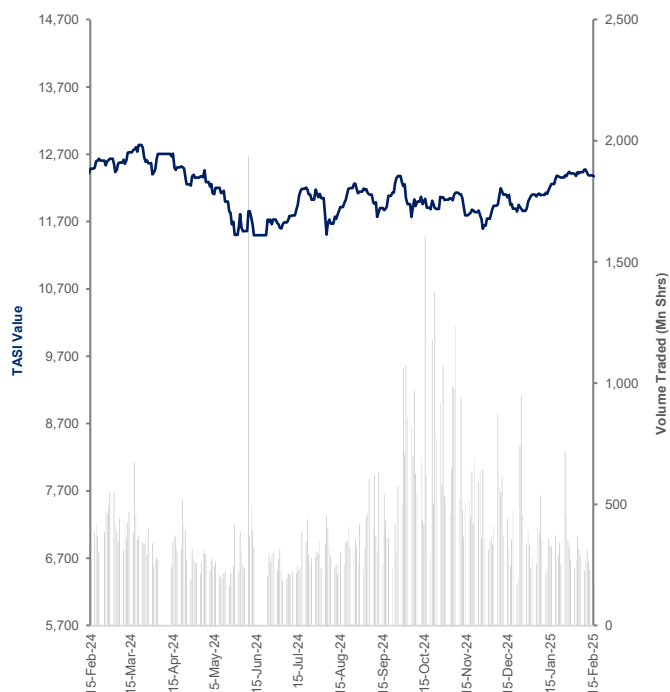
Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD 2025	YTD 2024
Volume (Shrs Mn)	668.0	125.5	23.1%	465.6	276.6
Value Traded (KWD Mn)	221.4	58.0	35.5%	116.9	68.1
No. of Trades	21,192	(1,290)	(5.7%)	20,070	15,440

Today's Most Active by Value	Close (KWD)	Percent Change	Value (KWD)
Oula Fuel Marketing Co.	0.711	5.3%	107,506,943
Arzan Financial Group For Fin. & Invest.	0.287	1.1%	16,128,423
Kuwait Business Town Real Estate Co.	0.164	2.5%	15,583,901
Kuwait Finance House	0.800	0.0%	10,160,858
Int'l Financial Advisors Co.	0.448	(1.5%)	4,562,354

## Saudi Tadawul Daily Report

February 17, 2025

## Index Performance relative to Volume



## Sector Returns

	Market Cap. (SAR Mn)	DTD % Chg	MTD % Chg	YTD % Chg
	10,256,110.4	(0.0%)	(0.2%)	0.5%
Energy	6,809,924.1	0.0%	0.0%	(0.8%)
Materials	626,259.1	(0.2%)	(0.6%)	(0.8%)
Capital Goods	70,413.0	(0.9%)	(0.3%)	4.4%
Commercial & Professional Svc	16,473.6	(0.6%)	0.6%	6.3%
Transportation	52,130.8	(0.9%)	0.6%	7.3%
Consumer Durables & Apparel	10,122.8	0.8%	4.1%	11.4%
Consumer Services	73,477.2	0.7%	3.0%	6.8%
Media	45,399.6	(2.5%)	(7.7%)	(5.4%)
Consumer Discretionary Distribution &	32,347.7	(0.6%)	0.7%	7.4%
Consumer Staples Distribution & Retail	54,661.1	(0.4%)	1.9%	18.0%
Food & Beverages	117,883.4	(0.6%)	(1.4%)	1.5%
Health Care Equipment & Svc	190,316.6	(0.8%)	(0.7%)	8.9%
Pharma, Biotech & Life Science	17,762.0	(0.1%)	(2.0%)	5.0%
Banks	1,013,033.1	0.3%	0.4%	4.0%
Financial Services	71,155.8	(0.4%)	(0.1%)	5.1%
Insurance	96,158.8	(0.2%)	(1.2%)	(0.9%)
Telecommunication Services	276,397.0	(0.8%)	0.4%	8.8%
Utilities	385,376.1	0.1%	(2.6%)	(1.3%)
REITs	15,240.8	(0.2%)	(1.7%)	(1.8%)
Real Estate Mgmt & Dev't	140,603.3	(0.1%)	0.4%	11.6%
Software & Services	140,515.4	0.7%	(5.2%)	1.9%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

## Top Movers and Most Active Stocks

Best Return Performers	Price (SAR)	Daily % Chg
Al-Ahsa Development Co	17.48	4.7%
Tanmiah Food Co.	132.00	4.3%
Ash-Sharqiyah Development Co	22.52	4.2%
Americana Restaurants International PLC	2.74	3.0%
Emaar Economic City	17.52	2.9%

Worst Return Performers	Price (SAR)	Daily % Chg
Saudi Research & Marketing Gro	228.80	(5.4%)
Saudi Re for Cooperative Reins	56.00	(3.3%)
Savola Group	37.65	(2.8%)
Nice One Beauty Digital Marketing Co.	66.30	(2.8%)
Abdullah Saad Mohammed Abo Moa	41.45	(2.7%)

Most Active Stocks By Volume	Price (SAR)	Volume ('000 Shrs)
Al-Baha Development & Investme	0.44	30,834
Americana Restaurants International PLC	2.74	19,249
Shams	0.91	7,467
National Agriculture Dev.	27.95	5,114
Electrical Industries Co	7.14	5,067

## Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
Tadawul All Share Index	12,372.07	(12.93)	(0.1%)	(0.3%)	2.8%
Market Cap (SAR Mn)	10,256,110	(3,849)	(0.0%)	(0.2%)	0.5%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume (Mn Shares)	175.2	(56.3)	(24.3%)	320.0	347.4
Value Traded (SAR Mn)	4,088.2	(890.6)	(17.9%)	6,175.1	8,762.8
No. of Trades	322,356	(68,080)	(17.4%)	460,225	527,311

Market Breadth	▲ 84	▼ 136	▬ 37
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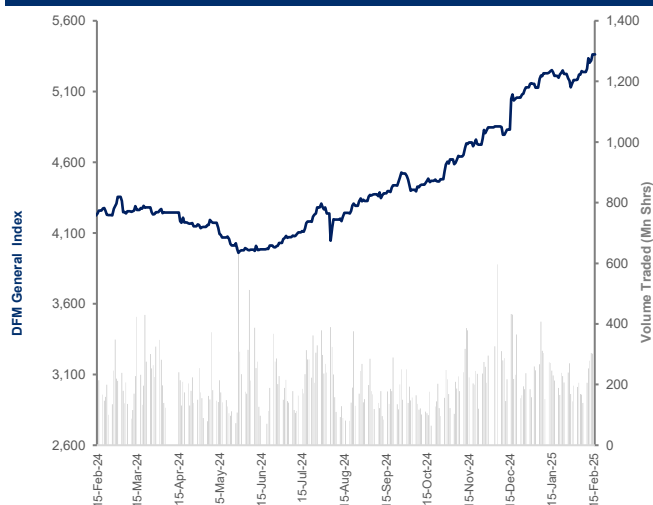
Most Active Stocks By Value	Price (SAR)	Daily % Chg	Value (SAR Mn)
Nice One Beauty Digital Marketing Co.	66.30	(2.8%)	303.43
Al Rajhi Bank	100.00	0.5%	157.02
Jahez International Company for Information System Technology	38.55	(0.1%)	148.72
National Agriculture Dev.	27.95	2.8%	141.49
Saudi Arabian Oil Co	27.80	0.0%	131.97

Source: Bloomberg, Kamco Invest Research

## Dubai Financial Market Daily Report

February 17, 2025

### Index Performance relative to Volume



### Sector Returns

	Market Cap. (AED Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Dubai Financial Market	934,441.5	0.6%	3.7%	3.3%
Financials	379,217.8	0.2%	2.6%	6.0%
Real Estate	199,760.1	1.0%	2.5%	4.3%
Industrial	102,236.3	1.9%	7.7%	0.8%
Materials	1,083.6	(6.8%)	(12.7%)	(13.2%)
Consumer Staples	31,054.7	(1.1%)	0.5%	(2.3%)
Consumer Discretionary	40,922.0	3.0%	9.2%	11.4%
Telecommunication	36,716.5	(1.2%)	2.8%	8.1%
Utilities	143,450.5	0.1%	5.2%	(4.7%)

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

### Top Movers and Most Active Stocks

Best Return Performers	Price (AED)	Daily % Chg
Air Arabia Pjsc	3.33	4.4%
Shuaa Capital	0.24	3.8%
Emaar Development	14.05	3.7%
SALIK	5.55	3.4%
TALABAT Holding PLC	1.58	3.3%

Worst Return Performers	Price (AED)	Daily % Chg
Int'L Financial Advisors Co.	4.95	(8.8%)
National Cement Co	3.02	(6.8%)
Emirates Investment Bank	87.10	(6.3%)
Takaful Emarat Insurance	1.40	(2.1%)
EMPOWER	1.74	(1.7%)

Most Active Stocks By Volume	Price (AED)	Volume ('000 Shrs)
TALABAT Holding PLC	1.58	79,334
Union Properties Pjsc	0.41	43,378
Shuaa Capital	0.24	29,558
SALIK	5.55	20,291
Drake & Scull International	0.34	18,532

### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
DFM General Index	5,361.96	42.76	0.8%	3.5%	3.9%
Market Cap (AED Mn)	934,442	5,163	0.6%	3.7%	3.3%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume (Mn Shares)	301.4	(2.8)	(0.9%)	232.7	134.6
Value Traded (AED Mn)	680.2	(316.1)	(31.7%)	653.4	359.0
No. of Trades	15,537	(6,773)	(30.4%)	14,114	6,948

Market Breadth	▲ 17	▼ 22	= 36
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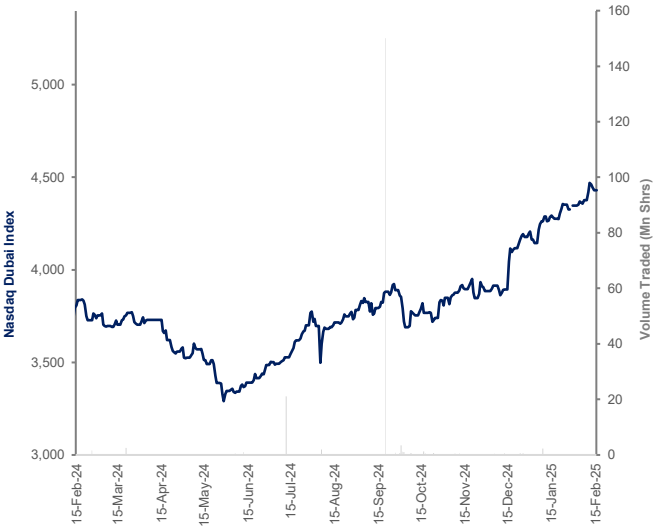
Most Active Stocks By Value	Price (AED)	Daily % Chg	Value (AED Mn)
Emaar Development	14.05	3.69%	166.47
TALABAT Holding PLC	1.58	3.27%	123.96
SALIK	5.55	3.35%	111.10
Air Arabia Pjsc	3.33	4.39%	50.68
DEWA	2.70	0.00%	47.69

Source: Bloomberg, Kamco Research

Nasdaq Dubai Daily Report

February 17, 2025

Index Performance relative to Volume



Sector Returns

	Market Cap. (USD Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Nasdaq Dubai	54,841.1	0.0%	2.4%	6.1%
DEPA Limited (AED)	130.8	(0.0%)	(10.0%)	(10.0%)
Emirates REIT (CEIC) Limited	171.5	0.2%	(8.2%)	7.1%
ENBD REIT (CEIC) Limited	96.8	0.0%	7.5%	9.9%
Hikma Pharmaceuticals GDR	6,286.0	0.0%	6.5%	13.8%
Nasdaq, Inc.	47,601.4	0.0%	2.1%	5.6%
Orascom Construction Limited	554.5	0.0%	(4.2%)	(18.1%)

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

Top Movers and Most Active Stocks

Best Return Performers	Price (USD)	Daily % Chg
Emirates Reit (Ceic) Limited	0.53	0.19%

Worst Return Performers	Price (USD)	Daily % Chg
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Most Active Stocks By Volume	Price (USD)	Volume ('000 Shrs)
Emirates Reit (Ceic) Limited	0.53	19.2

Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
FTSE Nasdaq Dubai UAE 20	4,429.09	(16.75)	(0.4%)	1.9%	5.3%
Market Cap (USD Mn)	54,841	0.3	0.0%	2.4%	6.1%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume (Mn Shares)	0.019	(0.06)	(76%)	0.132	0.08
Value Traded (USD Mn)	0.010	(0.30)	(97%)	0.2	0.03
No. of Trades	4.0	(3.00)	(43%)	5	4

Market Breadth	▲ 1	▼ 0	= 5
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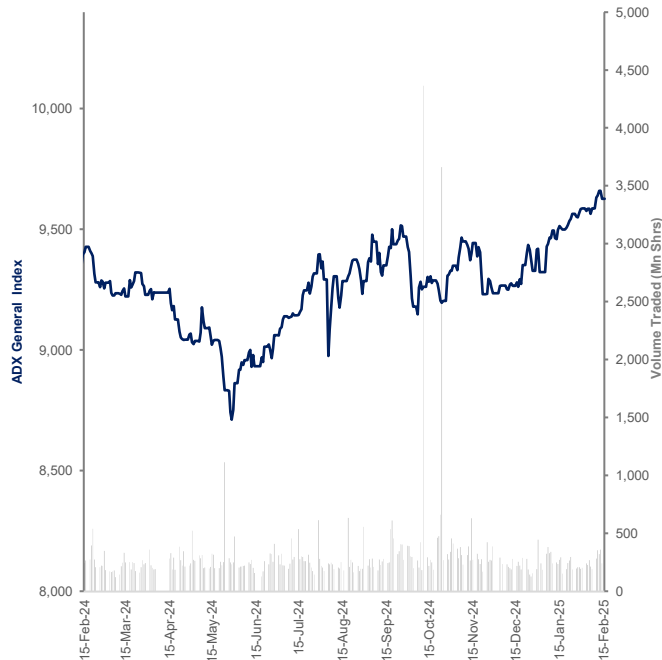
Most Active Stocks By Value	Price (USD)	Daily % Chg	Value (USD Mn)
Emirates Reit (Ceic) Limited	0.53	0.19%	0.01

Source: Bloomberg, Kamco Research

## Abu Dhabi Securities Exchange Daily Report

February 17, 2025

## Index Performance relative to Volume



## Sector Returns

	Market Cap. (AED Mn)	DTD % Chg	MTD % Chg	YTD % Chg
ADX	2,917,799.9	(0.3%)	0.1%	(0.3%)
Financials	1,397,292.2	(0.3%)	(0.0%)	1.8%
Telecommunication	184,880.7	0.1%	(2.2%)	4.5%
Consumer Discretionary	72,163.3	(1.3%)	1.4%	4.9%
Industrial	237,543.5	(0.7%)	(2.5%)	(0.8%)
Real Estate	77,889.3	(0.7%)	19.3%	19.3%
Basic Materials	96,570.3	0.5%	1.8%	4.4%
Energy	425,214.0	(0.3%)	3.2%	1.8%
Utilities	347,421.8	0.0%	(1.0%)	(12.0%)
Consumer Staples	30,378.3	(1.6%)	(16.0%)	(18.7%)
Health Care	48,446.5	(2.5%)	(8.2%)	(3.4%)

Sectors' MTD % Chg is based on the Change in market cap, and it might not conform with the benchmark % Chg for each sector

## Top Movers and Most Active Stocks

Best Return Performers	Price (AED)	Daily % Chg
Sudan Telecommunication Co.	0.28	11.5%
Fujairah Cement Industries	0.31	3.0%
ARAM Group	1.74	2.4%
Emsteel Building Materials Co.	1.26	1.6%
Waha Capital Co.	1.59	1.3%

Worst Return Performers	Price (AED)	Daily % Chg
Burjeel Holdings	1.75	(9.8%)
Gulf Medical Projects Co.	2.17	(5.2%)
Space42 PLC	1.88	(5.1%)
AGTHIA Group	5.36	(4.8%)
Hayah Insurance Co	1.34	(4.3%)

Most Active Stocks By Volume	Price (AED)	Volume ('000 Shrs)
Lulu Retail Holdings	1.47	51,643
Multiply Group	1.95	16,801
Abu Dhabi National Hotels Co.	0.59	14,254
Burjeel Holdings	1.75	13,970
ADNOC Drilling	5.50	13,394

## Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
FTSE ADX General Index	9,625.68	(33.05)	(0.3%)	0.4%	2.2%
Market Cap (AED Mn)	2,917,800	(9,013)	(0.3%)	0.1%	(0.3%)

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume (Mn Shares)	241.2	(117.3)	(32.7%)	254.4	211.6
Value Traded (AED Mn)	890.6	(458.3)	(34.0%)	1,009.3	964.2
No. of Trades	23,314	(6,891)	(22.8%)	19,444	13,286

## Market Breadth



18



35



35

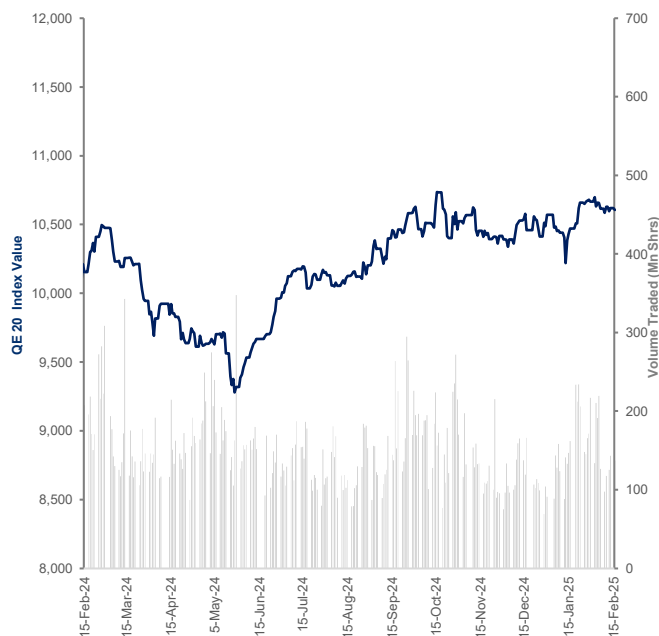
Most Active Stocks By Value	Price (AED)	Daily % Chg	Value (AED Mn)
International Holdings Company PJSC	401.60	0.02%	143.25
Lulu Retail Holdings	1.47	0.00%	76.73
Al Dar Properties Co.	9.19	(0.65%)	76.11
ADNOC Drilling	5.50	(1.43%)	74.20
Alpha Dhabi Holding PJSC	10.84	(1.45%)	65.55

Source: Bloomberg, Kamco Research

### Qatar Exchange Daily Report

February 17, 2025

#### Index Performance relative to Volume



#### Sector Returns

	Market Cap. (QAR Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Qatar Exchange	620,643.7	0.0%	(0.5%)	(0.1%)
Banking & Finance Sector	298,548.5	0.1%	0.1%	(2.3%)
Goods & Consumer Services	30,839.0	(0.5%)	(0.1%)	1.9%
Industrial Sector	149,382.7	0.0%	(2.4%)	0.7%
Insurance Sector	11,024.7	(0.3%)	(3.1%)	(0.7%)
Real Estate	43,336.2	1.6%	3.3%	(0.6%)
Telecom	48,855.7	(1.6%)	(2.5%)	9.2%
Transport	38,656.9	0.6%	1.3%	3.2%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

#### Top Movers and Most Active Stocks

Best Return Performers	Price (QAR)	Daily % Chg
Ezdan Holding Group QSC	1.04	2.7%
Dukhan Bank	3.82	1.6%
Mazaya Qatar Real Estate Devel	0.58	1.6%
Investment Holding Group	1.84	1.5%
Salam International Investment	0.69	1.3%

Worst Return Performers	Price (QAR)	Daily % Chg
Meeza	3.05	(2.2%)
Ooredoo QPSC	12.51	(2.0%)
QLMI Life and Medical Insurance	2.00	(1.9%)
Al Faleh Educational Holding	0.71	(1.4%)
Zad Holding Group	15.36	(1.0%)

Most Active Stocks By Volume	Price (QAR)	Volume ('000 Shrs)
Ezdan Holding Group QSC	1.04	29,440
Investment Holding Group	1.84	15,234
Dukhan Bank	3.82	14,336
Mazaya Qatar Real Estate Devel	0.58	11,274
Masraf Al Rayan QSC	2.39	8,161

#### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
QE 20 Index	10,604.89	(14.19)	(0.1%)	(0.6%)	0.3%
Market Cap (QAR Mn)	620,644	242	0.0%	(0.5%)	(0.1%)

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ('Mn Shares)	137.0	(6.0)	(4.2%)	156.8	161.8
Value Traded (QAR Mn)	301.1	(102.9)	(25.5%)	408.3	502.6
No. of Trades	8,828	(5,132)	(36.8%)	14,001	17,079

Market Breadth	▲ 18	▼ 27	= 8
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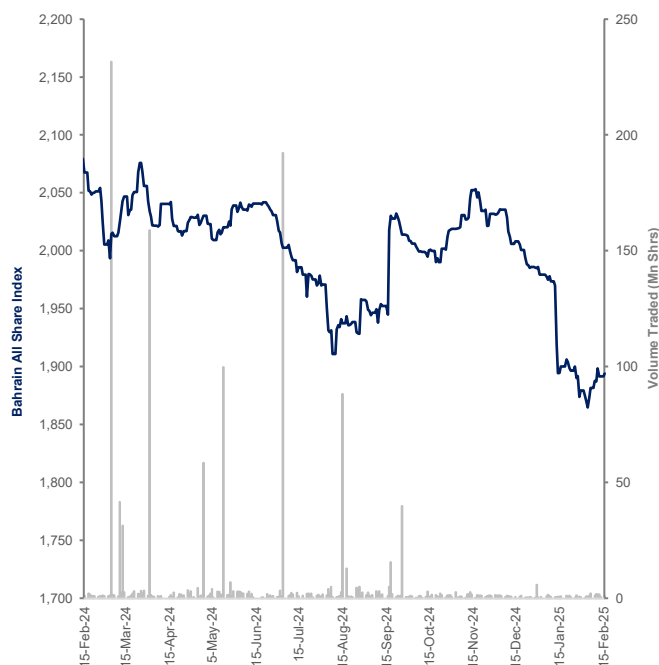
Most Active Stocks By Value	Price (QAR)	Daily % Chg	Value (QAR Mn)
Dukhan Bank	3.82	1.57%	54.69
Ezdan Holding Group QSC	1.04	2.66%	30.41
Investment Holding Group	1.84	1.55%	28.13
Masraf Al Rayan QSC	2.39	0.00%	19.53
Qatar National Bank QPSC	16.53	0.18%	18.61

Source: Bloomberg, Kamco Research

### Bahrain Bourse Daily Report

February 17, 2025

#### Index Performance relative to Volume



#### Sector Returns

	Market Cap. (BHD Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Bahrain Bourse	34,998.6	(0.3%)	0.5%	1.1%
Materials	1,455.5	(0.5%)	(3.3%)	(21.2%)
Industrial	126.8	0.4%	0.7%	(3.1%)
Consumer Discretionary	224.1	0.0%	(0.0%)	(4.0%)
Consumer Staples	122.2	(1.1%)	(0.7%)	(2.6%)
Financials	32,113.4	(0.3%)	0.7%	2.5%
Communication Services	888.3	0.0%	0.2%	0.7%
Real Estate	68.3	3.5%	10.4%	5.0%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

#### Top Movers and Most Active Stocks

Best Return Performers	Price (BHD)	Daily % Chg
Arab Insurance Group BSC	0.85	5.6%
Ithmaar Holding BSC	0.02	5.3%
Seef Properties BSC	0.12	4.3%
Bahrain Commercial Facilities	0.30	3.4%
BBK BSC	0.49	1.3%

Worst Return Performers	Price (BHD)	Daily % Chg
Nass Corp BSC	0.08	(6.7%)
Kuwait Finance House - Bahrain	2.52	(0.8%)
GFH FINANCIAL GROUP BSC	0.31	(0.6%)
Aluminium Bahrain B.S.C	1.03	(0.5%)

Most Active Stocks By Volume	Price (BHD)	Volume ('000 Shrs)
Ithmaar Holding BSC	0.02	220
GFH FINANCIAL GROUP BSC	0.31	179
Arab Insurance Group BSC	0.85	129
Seef Properties BSC	0.12	113
National Bank of Bahrain BSC	0.48	85

#### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
Bahrain All Share Index	1,893.88	2.28	0.1%	0.8%	(4.6%)
Market Cap (BHD Mn)	34,998.6	(113.7)	(0.3%)	0.5%	1.1%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ('000 Shares)	1,010	244	31.8%	943.3	2,105.8
Value Traded (BHD '000)	346	(385)	(52.7%)	391.3	1,112.0
No. of Trades	33	12	57.1%	36	58

#### Market Breadth

▲ 7 ▼ 4 = 33

Most Active Stocks By Value	Price (BHD)	Daily % Chg	Value (BHD Mn)
APM TERMINALS BAHRAIN	1.11	0.45%	0.07
GFH FINANCIAL GROUP BSC	0.31	(0.63%)	0.06
Aluminium Bahrain B.S.C	1.03	(0.49%)	0.05
Arab Insurance Group BSC	0.85	5.59%	0.04
National Bank of Bahrain BSC	0.00	0.00%	0.04

Source: Bloomberg, Kamco Research

### Muscat Stock Exchange Daily Report

February 17, 2025

#### Index Performance relative to Volume



#### Sector Returns

	Market Cap. (OMR Mn)	DTD % Chg	MTD % Chg	YTD % Chg
	11,821.2	(0.2%)	(1.8%)	(3.3%)
Financial	5,203.4	(0.1%)	(0.9%)	0.0%
Industrial	4,260.4	(0.4%)	(3.1%)	(6.6%)
Services	2357.4	(0.3%)	(1.4%)	(4.3%)

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

#### Top Movers and Most Active Stocks

Best Return Performers	Price (OMR)	Daily % Chg
Al Batinah Power Co.	0.07	2.9%
Abraj Energy Services	0.24	2.2%
Muscat Finance Co. Ltd.	0.050	2.0%
Muscat City Desalination	0.07	1.5%
Oman & Emirates Investment Holding Co.	0.07	1.5%

Worst Return Performers	Price (OMR)	Daily % Chg
Al Jazeera Services Co.	0.17	(8.9%)
Muscat Thread Mills Co.	0.14	(8.5%)
Gulf International Chemicals Co.	0.08	(3.8%)
Sembcorp Salalah	0.09	(3.1%)
Dhofar Generating Company	0.06	(3.1%)

Most Active Stocks By Volume	Price (OMR)	Volume ('000 Shrs)
Al Batinah Power Co.	0.07	3,908
Al Suwadi Power Co.	0.07	1,903
Bank Muscat	0.25	1,366
OQ Gas Networks	0.13	1,014
Sohar Bank	0.14	863

#### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
MSX 30 Index	4,479.03	0.75	0.0%	(1.4%)	(2.1%)
Market Cap (OMR Mn)	11,821.2	(28.93)	(0.2%)	(1.8%)	(3.3%)

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ('000 Shares)	12,593.0	(687.5)	(5.2%)	46,809.1	17,318.9
Value Traded (OMR '000)	1,567.5	(550.8)	(26.0%)	3,272.4	3,053.0

Market Breadth	▲ 12	▼ 20	= 86
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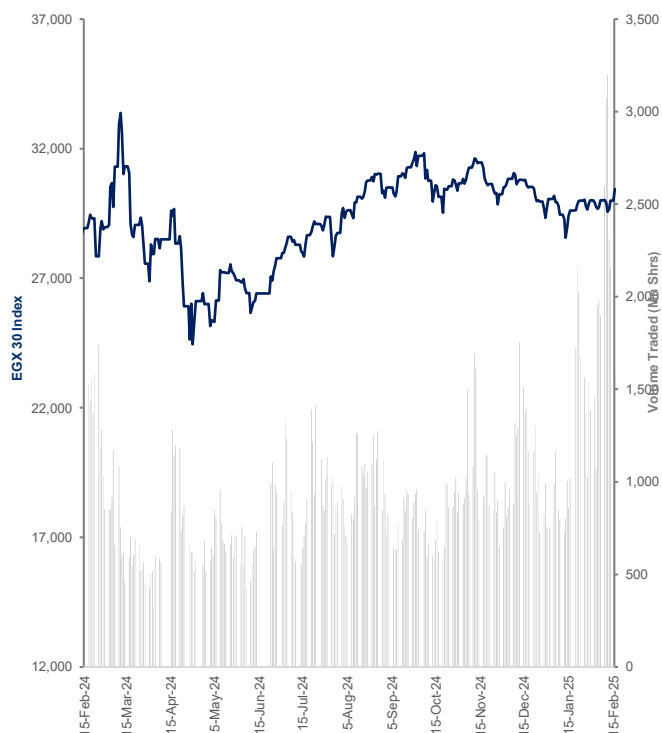
Most Active Stocks By Value	Price (OMR)	Daily % Chg	Value (OMR Mn)
Bank Muscat	0.25	(0.78%)	0.35
Al Batinah Power Co.	0.07	2.94%	0.28
Al Suwadi Power Co.	0.07	1.47%	0.13
OQ Exploration & Production SA	0.31	(0.64%)	0.13
OQ Gas Networks	0.13	0.78%	0.13

Source: Bloomberg, KAMCO Research

### The Egyptian Exchange Daily Report

February 17, 2025

#### Index Performance relative to Volume



#### Sector Returns

	Market Cap. (EGP Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Top 60 Stocks	2,169,871.9	0.5%	(0.6%)	2.2%
Banks	417,074.1	(4.4%)	(2.4%)	(4.7%)
Basic Resources	330,072.2	1.4%	(0.7%)	12.3%
Industrial Goods	189,741.3	4.4%	(1.7%)	6.7%
Health Care & Pharmaceuticals	51,230.1	1.6%	(0.7%)	3.1%
Real Estate	315,800.5	2.2%	(0.7%)	1.5%
Travel and Leisure	69,802.7	0.1%	1.2%	(3.6%)
Food, Beverages & Tobacco	198,965.3	0.6%	4.9%	6.4%
Energy and Support Services	19,427.5	0.4%	(2.9%)	(0.3%)
Trade and Distributors	16,850.6	0.6%	(4.0%)	(6.0%)
Shipping and Transport	72,615.2	1.2%	(5.2%)	(5.5%)
Education Services	25,992.8	0.2%	(1.1%)	8.1%
Contracting and Construction Eng	39,752.5	1.8%	2.2%	(1.9%)
Textiles and Durables	29,249.6	2.0%	(2.1%)	2.1%
Building Materials	27,099.3	2.4%	(1.3%)	19.1%
Media & Communication Services	150,440.1	1.8%	(0.6%)	0.1%
Paper and Packaging	2,382.1	(0.7%)	(4.1%)	(5.8%)
Non-bank Financial Services	213,376.0	1.6%	0.6%	0.7%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

#### Top Movers and Most Active Stocks

Best Return Performers	Price (EGP)	Daily % Chg
Cairo Educational Services	32.02	10.6%
Misr National Steel - Ataq	5.74	8.9%
Emaar Misr for Development	7.41	6.9%
AJWA for Food Industries company Egypt	123.86	6.7%
Cairo Poultry	16.20	6.2%

Worst Return Performers	Price (EGP)	Daily % Chg
Development & Engineering Consultants	50.26	(10.2%)
El Nasr For Manufacturing Agricultural Crops	25.74	(4.7%)
Rakta Paper Manufacturing	21.66	(4.0%)
Juhayna Food Industries	36.30	(4.0%)
Taaleem Management Services	11.52	(3.1%)

Most Active Stocks By Volume	Price (EGP)	Volume ('000 Shrs)
Cairo Oils & Soap	0.40	296,965
Egyptians Housing Development & Reconstruction	0.45	239,228
Egyptians For Investment & Urban Development	0.30	175,193
Aspire Capital Holding For Financial Investments	0.30	85,830
Orascom Investment Holding	0.54	64,653

#### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
EGX 30 Index	30,443.82	446.7	1.5%	1.4%	2.4%
Market Cap (EGP Mn)	2,169,871.9	11,272.8	0.5%	(0.6%)	2.2%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume (Mn Shares)	1,573.7	(581.7)	(27.0%)	1,555.9	1,303.2
Value Traded (EGP Mn)	3,128.5	89.7	3.0%	3,287.1	5,256.4
No. of Trades	87,281	10,681	13.9%	92,073	160,786

Market Breadth	▲ 132	▼ 20	= 69
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Most Active Stocks By Value	Price (EGP)	Daily % Chg	Value (EGP Mn)
Emaar Misr for Development	7.41	6.93%	197.57
Egyptian Financial Group-Hermes Holding Company	23.63	3.23%	186.81
Cairo For Investment And Real Estate Development	15.48	3.27%	173.91
Ezz Steel	133.70	(0.14%)	145.50
Cairo Oils & Soap	0.40	0.76%	119.51

Source: Bloomberg, Kamco Research

## Amman Stock Exchange Daily Report

February 17, 2025

## Index Performance relative to Volume



## Sector Returns

	Market Cap. (JD Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Amman Stock Exchange	18,414.4	(0.5%)	(1.7%)	5.9%
Banks	8,012.0	0.2%	(1.3%)	4.6%
Insurance	276.5	1.2%	2.1%	(0.2%)
Diversified Financial Services	268.1	(0.4%)	(1.7%)	(1.4%)
Real Estate	297.5	(0.5%)	(2.8%)	(2.5%)
Health Care Services	51.1	(1.2%)	(3.0%)	(0.8%)
Educational Services	290.0	(1.4%)	(0.2%)	3.9%
Hotels and Tourism	245.8	0.0%	(4.1%)	(4.6%)
Transportation	88.2	0.4%	(1.5%)	3.6%
Technology and Communication	579.1	(0.7%)	0.3%	6.6%
Utilities and Energy	1,008.5	0.6%	(0.1%)	5.0%
Commercial Services	243.1	0.1%	(2.7%)	(6.0%)
Pharmaceutical and Medical Industries	67.8	0.1%	(1.7%)	2.7%
Chemical Industries	60.0	(0.5%)	(4.1%)	4.1%
Food and Beverages	217.8	(0.1%)	0.8%	(0.1%)
Tobacco and Cigarettes	1.8	0.0%	(7.7%)	(14.3%)
Mining and Extraction Industries	6,555.3	(1.7%)	(2.5%)	10.3%
Engineering and Construction	99.7	(1.3%)	(6.2%)	(8.8%)
Electrical Industries	21.7	3.3%	(1.6%)	6.9%
Textiles Leathers and Clothings	30.3	0.0%	1.0%	0.0%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

## Top Movers and Most Active Stocks

Best Return Performers	Price (JD)	Daily % Chg
AMOUN INTERNATIONAL FOR INVESTMENTS	0.44	4.8%
GULF INSURANCE GROUP - JORDAN	2.00	4.7%
JORDAN INSURANCE	1.15	4.5%
THE ISLAMIC INSURANCE	1.74	4.2%
ARAB INVESTORS UNION CO. FOR REAL ESTATES DEVELOPING	0.36	2.9%

Worst Return Performers	Price (JD)	Daily % Chg
AL-NISR AL-ARABI INSURANCE	2.81	(4.7%)
JORDAN KUWAIT BANK	2.71	(4.6%)
PETRA EDUCATION COMPANY	3.15	(4.5%)
JORDAN FRENCH INSURANCE	0.66	(4.3%)
RUMM FINANCIAL BROKERAGE	0.25	(3.8%)

Most Active Stocks By Volume	Price (JD)	Volume ('000 Shrs)
JORDAN INVESTMENT TRUST	0.82	746
AL-TAJAMOUAT FOR TOURISTIC PROJECTS CO PLC	0.61	207
CAPITAL BANK OF JORDAN	1.96	135
JORDAN AHLI BANK	1.05	100
ARAB BANK	4.86	88

Source: Bloomberg, Kamco Research

## Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
ASE Index	2,574.61	(4.19)	(0.2%)	(1.6%)	3.4%
Market Cap (JD Mn)	18,414.35	(95.06)	(0.5%)	(1.7%)	5.9%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ('000 Shares)	3,004.4	559.6	22.9%	3,071.1	2,881.0
Value Traded (JD '000)	4,811.1	(716.9)	(13.0%)	5,927.9	3,140.3
No. of Trades	2,049	(99)	(4.6%)	2,228	1,818

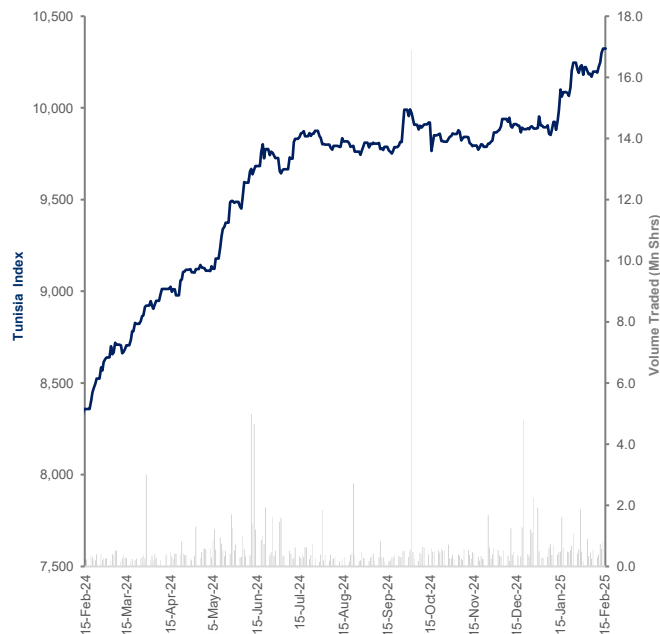
Market Breadth	▲ 24	▼ 36	▬ 101
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Most Active Stocks By Value	Price (JD)	Daily % Chg	Value (JD Mn)
JORDAN INVESTMENT TRUST	0.82	(1.20%)	0.60
ARAB BANK	4.86	0.83%	0.43
CAPITAL BANK OF JORDAN	1.96	1.55%	0.26
JORDAN ISLAMIC BANK	4.22	(0.47%)	0.17
AL-TAJAMOUAT FOR TOURISTIC PROJECTS CO PLC	0.61	0.00%	0.13

### Tunisia Stock Exchange Daily Report

February 17, 2025

#### Index Performance relative to Volume



#### Sector Returns

	Market Cap. (DT Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Tunisia Stock Exchange	23,653.5	0.2%	0.9%	4.0%
Banking	10,606.4	0.4%	0.8%	4.3%
Insurance	953.3	0.0%	(2.9%)	(2.8%)
Leasing	956.4	0.7%	1.3%	4.7%
Financial Services	1,530.0	(0.2%)	(1.6%)	(2.1%)
Industrial	2,054.8	0.8%	1.6%	(0.2%)
Chemical Industry	460.5	(0.6%)	(1.1%)	8.5%
Food & Beverage	4,261.3	(0.4%)	2.2%	6.7%
Retailing	1,296.0	0.8%	1.6%	13.4%
Others	1,534.7	(0.2%)	1.7%	1.6%

Sectors' MTD % Chg is based on the Change in market cap, and it might not conform with the benchmark % Chg for each sector

#### Top Movers and Most Active Stocks

Best Return Performers	Price (DT)	Daily % Chg
Accumulateur Tunisienne Assad	0.83	7.8%
Manufacture de Panneaux Bois D	11.21	6.0%
Societe Nouvelle Maison de la	3.40	4.9%
Delice Holding	19.84	3.4%
Tunisie Profiles Aluminium SA	6.95	2.7%

Worst Return Performers	Price (DT)	Daily % Chg
Societe Chimique ALKIMIA	16.14	(4.5%)
BH Leasing	4.00	(2.4%)
Universal Auto Distributors Ho	0.40	(2.4%)
Societe Ciments de Bizerte	0.42	(2.3%)
Societe Tunisienne d'Entreprise	7.00	(2.1%)

Most Active Stocks By Volume	Price (DT)	Volume ( <sup>'000</sup> Shrs)
Accumulateur Tunisienne Assad	0.83	137
Tunisie Profiles Aluminium SA	6.95	137
Delice Holding	19.84	87
Societe Tunisienne de Banque	2.69	66
One Tech Holding	9.34	47

#### Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
Tunisia Index	10,323.47	25.06	0.2%	1.4%	3.7%
Market Cap (DT Mln)	23,653	42.46	0.2%	0.9%	4.0%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ( <sup>'000</sup> Shares)	826.8	254.8	44.6%	585.9	371.6
Value Traded ( <sup>'000</sup> DT)	6,282.6	713.4	12.8%	5,136.8	3,624.1
No. of Trades	2,462	834	51.2%	1,455	890

Market Breadth	▲ 19	▼ 19	= 26
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Most Active Stocks By Value	Price (DT)	Daily % Chg	Value (DT Mn)
Delice Holding	19.84	3.39%	1.73
Tunisie Profiles Aluminium SA	6.95	2.66%	0.95
One Tech Holding	9.34	(0.11%)	0.44
Societe D'Articles Hygieniques	9.95	(0.10%)	0.32
Banque Internationale Arabe de	97.50	0.10%	0.32

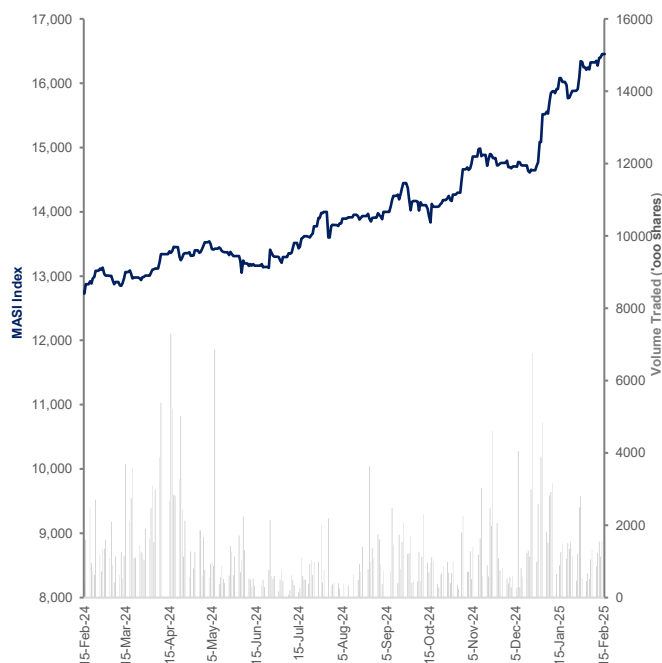
Source: Bloomberg, Kamco Research

## Casablanca Stock Exchange Daily Report

(The Bulletin covers the 41 Stocks listed on the Main Market)

February 17, 2025

## Index Performance relative to Volume



## Sector Returns

	Market Cap. (MAD Mn)	DTD % Chg	MTD % Chg	YTD % Chg
Casablanca Stock Exchange	691,166.7	0.4%	1.9%	12.0%
Banking	274,712.0	0.8%	0.5%	8.7%
Beverages	9,210.7	(2.2%)	0.8%	1.0%
Chemicals	2,916.8	(0.2%)	1.3%	15.3%
Construction & Building Material	78,082.1	(0.7%)	(1.2%)	2.3%
Distributors	17,329.0	(0.7%)	2.5%	3.8%
Electricity	36,090.5	2.0%	10.5%	14.2%
Food Producers & Processors	26,965.0	(0.5%)	(0.5%)	2.8%
Holding Companies	6,219.6	(1.9%)	0.4%	24.6%
Insurance	32,851.3	(0.8%)	0.8%	6.6%
Investment & other Finance	3,616.8	1.2%	(3.3%)	(3.5%)
Leisures & Hotel	4,298.1	(0.0%)	8.7%	33.9%
Materials, Software & Computer	6,141.6	(0.5%)	(3.2%)	7.8%
Mining	53,249.3	4.8%	15.7%	32.3%
Oil & Gas	15,815.9	1.8%	17.5%	22.4%
Real Estate	30,283.8	2.8%	0.9%	14.6%
Telecommunications	91,953.4	(2.2%)	(1.6%)	27.5%
Transport	1,324.1	0.1%	(0.9%)	(1.5%)
Forestry & Paper	106.8	(0.8%)	1.5%	8.7%

Sectors' MTD % Chg is based on the Change in market cap. and it might not conform with the benchmark % Chg for each sector

## Top Movers and Most Active Stocks

Best Return Performers	Price (MAD)	Daily % Chg
Managem SA	3850.00	5.48%
Alliances Developpement Immobi	569.40	3.53%
Salafin	599.00	3.28%
Credit Immobilier et Hotelier	460.00	2.79%
Douja Promotion Groupe Addoha	44.00	2.33%

Worst Return Performers	Price (MAD)	Daily % Chg
ATLANTA	150.00	(3.01%)
Societe Des Boissons du Maroc	2400.00	(2.99%)
Maroc Telecom	104.60	(2.20%)
Maghreb Oxygene	470.00	(2.08%)
Delta Holding SA	71.00	(1.92%)

Most Active Stocks By Volume	Price (MAD)	Volume ( <sup>0</sup> 00 Shrs)
Maroc Telecom	104.60	830.3
Douja Promotion Groupe Addoha	44.00	295.2
Alliances Developpement Immobi	569.40	83.6
Auto Hall	75.00	64.5
Attijariwafa Bank	645.00	61.9

## Trading Indicators

Market Return	Closing Value	DTD Chg	DTD % Chg	MTD % Chg	YTD-25 % Chg
MASI Index	16,452.23	54.69	0.3%	0.7%	11.4%
Market Cap (MAD Mn)	691,167	2,967	0.4%	1.9%	12.0%

Trading Indicators	Today's Value	DTD Chg	DTD % Chg	Average Daily YTD-25	YTD-24
Volume ( <sup>0</sup> 00 Shares)	1,547.6	415.6	36.7%	1,600.5	1,057.5
Value Traded (MAD Mn)	272.17	111.16	69.0%	290.0	136.7

## Market Breadth

▲ 18 ▼ 18 = 5

Most Active Stocks By Value	Price (MAD)	Daily % Chg	Value (MAD Mn)
Maroc Telecom	104.60	(2.20%)	80.37
Alliances Developpement Immobi	569.40	3.53%	43.90
Attijariwafa Bank	645.00	1.10%	39.53
Credit du Maroc SA	1150.00	1.68%	17.29
TAQA Morocco SA	1530.00	2.00%	11.58

Source: Bloomberg, Kamco Research

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