

Global Equities Advanced on Policy Support and Investor Optimism



BLOMINVEST
BANK

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	19/09/2025	12/09/2025	% Change
BLOM Stock Index	2,017.33	1,932.92	4.37%
Average Traded Volume	21,814	51,134	-57.34%
Average Traded Value	901,063	1,098,689	-17.99%
Market Cap	20,675,879,956	19,810,751,699	

The **BLOM Stock Index (BSI)** compiled by BLOM Invest Bank daily increased weekly by 4.37% to 2,017.33 points on September 19th, 2025.

On the Beirut Stock Exchange (BSE), the real estate sector dominated trading; accounting for 89.620% of the exchange's total trading value, while the remaining were grasped by the banking sector (6.119%) and the industrial sector (4.261%). The most noteworthy trades throughout the mentioned period included:

	19/09/2025	12/09/2025	% Change
Solidere A	79.35	75	5.80%
Solidere B	80.2	73.95	8.45%
HOLCIM Liban (prev.SCL)	75	72	4.17%
BLOM (GDR)	7	7.01	-0.14%

	19/09/2025	12/09/2025	% Change
BLOM Preferred Shares Index	20.22	20.22	0.00%

As for the BLOM Preferred Shares Index (BPSI), it stabilized at 20.22.

US Stocks

Index	Currency	19/09/2025	12/09/2025	% Change
S&P 500	USD	6,631.96	6,584.29	0.72%
Dow Jones	USD	46,142.42	45,834.22	0.67%
NASDAQ Comp	USD	22,470.72	22,141.10	1.49%

*prices are as of the time of writing this report

US markets had a strong week, with the S&P 500, Dow Jones, and Nasdaq all advancing, extending their record highs after the Federal Reserve delivered its first rate cut in nine months. Investors welcomed the quarter-point reduction and the prospect of two further cuts this year, which fueled optimism that policy is now geared toward supporting growth. Technology shares led the rally, particularly Intel, which spiked following Nvidia's \$5 billion co-development investment, while mega-cap names like Palantir, Coinbase, and CrowdStrike also surged. Jobless claims falling sharply helped ease concerns about labor market weakness, reinforcing the positive outlook. The week's performance underscored strong investor confidence in monetary easing and corporate momentum in the tech sector, which more than offset earlier caution ahead of the Fed meeting.

European Stocks

Index	Currency	19/09/2025	12/09/2025	% Change
DAX	EUR	23,772.97	23,698.15	0.32%
FTSE 100	GBP	9,240.74	9,283.29	-0.46%
CAC 40	EUR	7,923.33	7,825.24	1.25%
STOXX600	EUR	556.45	554.84	0.29%

*prices are as of the time of writing this report

European equities posted mixed results this week as investors digested central bank decisions and sector-specific developments. The DAX advanced slightly, supported by strong gains in tech names such as SAP and Infineon, though volatility in Continental after its spin-off capped the upside. France's CAC 40 outperformed, driven by luxury and technology stocks, while sentiment was boosted by the Fed's rate cut and the BoE's decision to slow gilt sales, which eased credit pressure. In contrast, the FTSE 100 declined as UK retailers like Next weighed on the index with cautious guidance despite reporting higher sales and profits, while macroeconomic headwinds such as weak employment data and

sluggish growth expectations continued to drag sentiment. Overall, European stocks were lifted by central bank easing and robust performance in tech and luxury, though the UK lagged on domestic concerns.

Asian Stocks

Index	Currency	19/09/2025	12/09/2025	% Change
NIKKEI	JPY	45,045.81	44,768.12	0.62%
Hang Seng	HKD	26,545.10	26,388.16	0.59%
Shanghai Comp	CNY	3,820.09	3,870.60	-1.30%

*prices are as of the time of writing this report

Asian markets moved unevenly as global monetary policy and regional developments shaped sentiment. Japan's Nikkei gained, hitting fresh highs earlier in the week as semiconductor stocks surged on Fed easing, though weak trade data highlighted ongoing export challenges. Hong Kong's Hang Seng also rose modestly, encouraged by gains in tech and consumer shares, optimism over AI and innovation, and policy support from the HKMA cutting rates in line with the Fed. In contrast, China's Shanghai Composite declined, reversing from decade-highs as investors locked in profits and sentiment soured after the PBoC kept key rates unchanged, signaling no urgency for fresh stimulus. Additional pressure came from reports that regulators ordered firms to halt Nvidia chip purchases, denting tech optimism. As a result, while Japan and Hong Kong tracked Wall Street's rally, mainland China stood out with notable weakness tied to policy caution and regulatory tightening.

Global Stocks

Index	Currency	19/09/2025	12/09/2025	% Change
MSCI Emerging Market	USD	1,345.83	1,325.73	1.52%

*prices are as of the time of writing this report

The MSCI Emerging Market index rose this week by 1.52% to reach 1,345.83.

Arab Stocks

Index	Currency	19/09/2025	12/09/2025	% Change
S&P Pan Arab	USD	1,015.72	997.24	1.85%
EGX30 - Egypt	EGP	35,403.00	34,937.44	1.33%
Saudi Stock Exchange	SAR	10,780.69	10,453.06	3.13%
Qatar Stock Exchange	QAR	11,307.85	11,093.12	1.94%
Abu Dhabi Securities Exchange	AED	10,122.76	10,014.15	1.08%
Dubai Financial Market	AED	6,023.89	6,030.55	-0.11%

*prices are as of the time of writing this report

Arab stock markets recorded solid gains this week, with S&P Pan Arab index advancing as regional sentiment improved in line with global risk-on momentum. The Saudi Stock Exchange led the rally, supported by energy driven optimism and strong corporate flows, while Qatar, Egypt, and Abu Dhabi also posted steady increases on continued investor confidence. Dubai was the only major market to slip slightly, as profit taking in real estate and financials weighed on performance.

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