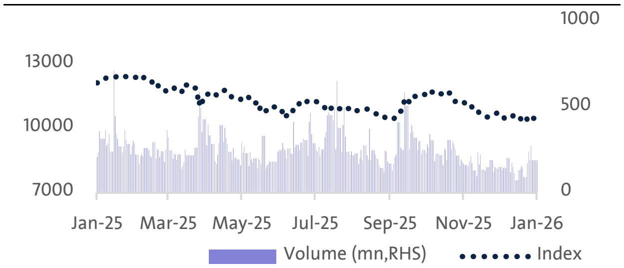
alinma capital الإنماء المالية

Daily Market Report

Key Indices-Return and Valuation

	30-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	10800	0.1%	0.0%	2%	14.0	1.6
NOMU	23051	-0.1%	0.0%	-2%	0.0	1.6
S&P500	7499	0.8%	0.0%	10%	21.8	5.6
Dow Jones	52319	0.3%	0.0%	9%	13.0	6.0
FTSE 100	10497	0.1%	0.0%	6%	13.0	2.4
EuroStoxx50	6328	1.5%	0.0%	9%	16.2	2.5
Nikkei225	70062	0.9%	-0.7%	39%	24.6	3.2
MSCI EM	1723	0.9%	0.0%	23%	12.6	2.5
SHCOMP	4094	0.5%	-0.4%	3%	14.5	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
30-Jun	164	88	18	1.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	30-Jun	Δ bps	YTD Av	30-Jun	Δ bps	YTD Av
1M	4.65	2.2	5.6	3.64	-0.9	4.3
3M	4.73	-4.2	5.4	3.73	-1.2	4.3
6M	5.10	-15.7	5.5	3.85	-1.9	4.2
12M	4.92	2.4	5.2	3.99	-2.8	4.0

Commodities

		30-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	83	0.2	135	60	-11.5
Brent	USDbbl	73	-0.3	118	59	-10.8
Gold	USDOz	3964	-0.3	5502	3277	-19.4
Silver	USDOz	59	0.6	117	36	-36.0
Aluminum	USDton	3070	-0.5	3851	2553	-13.7
Copper	USDton	13366	0.3	14140	9594	-15.4

Av=Average, YTD=Year to Date, MTD=Month to Date, DoD=Day Over Day (*last session relative to session before) **Per 25ton, Source: Bloomberg, TASI

Saudi Arabia

SAMA's assets shrink SAR 12.1 to SAR 1.93T in May

Assets held by the Saudi Central Bank (SAMA) decreased by about SAR 12.1 billion month-on-month (MoM) to nearly SAR 1.93 trillion in May 2026. These assets shrank by around SAR 61 billion on a year-on-year (YoY) basis, according to data released by SAMA. **(Argaam)**

Arabian Pipes signs SAR 133M contract with Saudi Aramco

Arabian Pipes Co. (APC) signed a contract on June 30 with Saudi Arabian Oil Co. (Saudi Aramco) to manufacture and supply steel pipes for SAR 133 million, according to a statement to Tadawul. The contract has a duration of nine months, with the relevant financial impact expected to appear in the first and second quarters of 2027. **(Argaam)**

Acwa signs 25-year agreements for $700M Mauritania power project

Acwa Power said its 60%-owned N'Diago project company signed a 25-year public-private partnership (PPP) agreement with the Mauritanian government on June 30, along with a related gas-to-electricity conversion agreement (CCE) with SOMELEC for the 230 MW N'Diago combined-cycle gas turbine (CCGT) power plant. **(Argaam)**

Tasnee, Sipchem complete ethylene plant expansion; trials begin

National Industrialization Co. (Tasnee) and Sahara International Petrochemical Co. (Sipchem) completed construction on the expansion of the ethylene cracker plant operated by the Saudi Ethylene and Polyethylene Co. (SEPC). The project is a joint venture between Tasnee and Sahara Olefins Co. (TSOC)—which is 60%-owned by a subsidiary of Tasnee and 32.5% by Sipchem. **(Argaam)**

CMA OKs AlManhal's 900,000 share offering on Nomu

The Capital Market Authority's (CMA) board of directors approved AlManhal Co.'s planned initial public offering (IPO) of 900,000 shares (representing 15% of capital) on the Nomu-Parallel Market. **(Argaam)**

Global

Global AI wave revs up Asian factories, offsetting war-induced pain

The global AI boom powered Asia's manufacturing sector in June, with brisk demand for technology-related goods offsetting the drag from the Iran war, business surveys showed on Wednesday, offering some relief for the region's export-reliant economies. Price pressures, however, remained elevated as supply shortages and shipping delays lengthened lead times, suggesting the energy shock tied to the Middle East conflict could intensify across the region in coming months. **(Reuters)**

Trump reports over $1.4 billion in income from crypto ventures

U.S. President Donald Trump reported more than $1.4 billion in income from his family's crypto ventures last year, showing how Trump now derives most of his income from digital assets that have benefited from his policies, according to a review of his latest financial disclosures on Tuesday. **(Reuters)**

Commodities

Oil prices rise as breakdown in Iran-US talks raises supply concerns

Oil prices rose on Wednesday on concerns breakdowns in discussions between Iran and the U.S. for a final agreement to end their war may extend supply disruptions in the key Middle East producing region. Brent futures rose 33 cents, or 0.45%, to $73.28 a barrel at 0339 GMT, while U.S. West Texas Intermediate (WTI) crude climbed 34 cents, or 0.49%, to $69.84 a barrel. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		29-Jun	30-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2236	2238	0.1%	-2.0%	0.3%
Value	mn	4380	5477	25.1%	-8.5%	-15.4%
Volume	mn	235	294	25.1%	4.3%	-6.6%
NOMU						
Market Cap	mn	7423	7442	0.3%	0.5%	-1.9%
Value	mn	14.7	16.2	9.7%	-10.5%	-33.5%
Volume	mn	2.0	2.5	23.0%	0.3%	-0.3%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALWAHA REIT	11.49	2.15	23%
ALRAZI	31.9	2.9	10%
BALADY	153	13.6	10%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
KEIR	1.94	-0.83	-30%
LEAF	20.4	-1.46	-7%
ALRASHEED	65.5	-4.45	-6%

Source: Tadawul

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SHARQIYAH DEV	15.09	1.37	10%
TAPRCO	18.2	1.65	10%
MUTAKAMELA	12.03	1.09	10%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALBABTAIN	64.7	-2.55	-4%
ALHAMMADI	27.02	-0.86	-3%
CENOMI RETAIL	13.91	-0.38	-3%

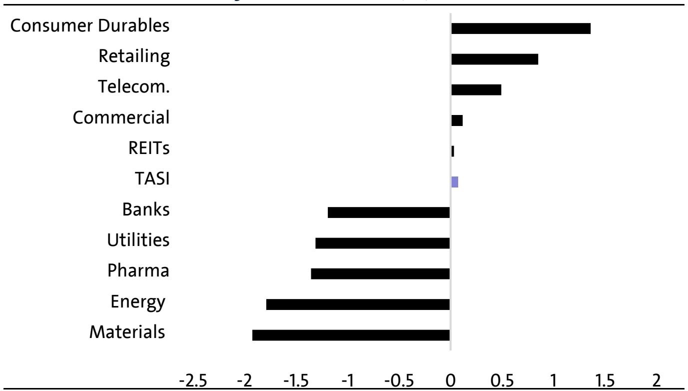
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI DARB	2.29	0.07	3%	24.6
AMERICANA	2.09	0.04	2%	17.3
SIECO	2.41	0.04	2%	13.7

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SNB	38.66	0.04	0%	477
ALRAJHI	65.9	0.1	0%	367
SAUDI ARAMCO	26.12	0	0%	317

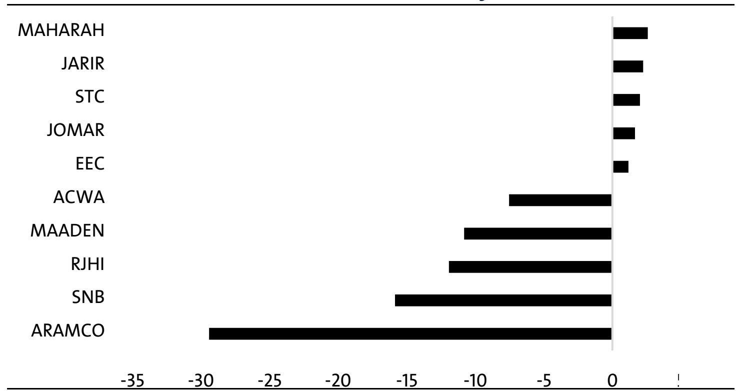
Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
06-Jul	ALDAWAA	Ex-Dividend
06-Jul	SAUDI GERMAN HEALTH	Ex-Dividend
08-Jul	DAR ALMARKABAH	General Assembly
09-Jul	KINGDOM	Cash Dividend
09-Jul	SHL	Cash Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
01-Jul	E.U.	Consumer Price Index	Jun	3.2%	3.2%
02-Jul	U.S.	Initial Jobless Claims	Jun	225.00K	230.00K
02-Jul	U.S.	Average Hourly Earnings MoM	Jun	0.3%	0.2%
03-Jul	U.S.	Independence Day Holiday			
06-Jul	U.S.	Services Purchasing Managers Index	Jun	51.1	50.7

Source: Bloomberg, Investing.Com

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