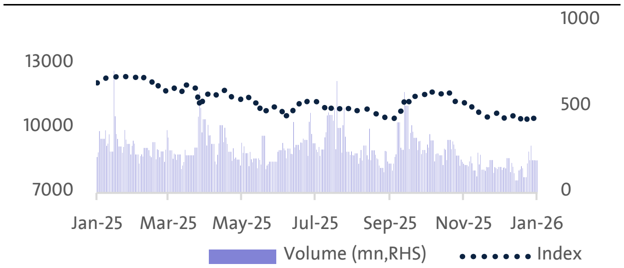
الإنمـاء الماليـة
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	01-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10857	0.5%	0.0%	3%	14.1	1.6
NOMU	22912	-0.6%	0.0%	-3%	0.0	1.6
S&P500	7483	-0.2%	0.0%	9%	21.9	5.7
Dow Jones	52305	0.0%	0.0%	9%	13.0	6.0
FTSE 100	10478	-0.2%	0.0%	6%	13.0	2.4
EuroStoxx50	6283	-0.7%	0.0%	8%	16.0	2.5
Nikkei225	70475	0.6%	0.0%	40%	24.9	3.2
MSCI EM	1722	-0.1%	0.0%	23%	12.7	2.5
SHCOMP	4112	0.4%	0.0%	4%	14.6	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
01-Jul	183	85	1	2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	01-Jul	Δ bps	YTD Av	01-Jul	Δ bps	YTD Av
1M	4.62	-0.8	5.6	3.65	0.5	4.3
3M	4.75	-2.3	5.4	3.73	0.8	4.3
6M	5.10	-15.4	5.5	3.85	1.2	4.2
12M	4.93	3.5	5.2	3.99	2.3	4.0

Commodities

		01-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	78	-6.6	135	60	-11.5
Brent	USDbbl	72	-1.9	118	59	-10.8
Gold	USDOz	4074	1.0	5502	3277	-18.8
Silver	USDOz	59	0.9	117	36	-36.1
Aluminum	USDton	3066	-0.1	3851	2553	-13.8
Copper	USDton	13209	-1.2	14140	9594	-15.5

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

Residential mortgages to individuals dip 41% to SAR 4.37B in May

Residential mortgages provided by banks to individuals declined by 41% year-on-year (YoY) to SAR 4.37 billion in May 2026, data issued by the Saudi Central Bank (SAMA) showed. On a monthly basis, residential mortgage financing fell by 31%, or SAR 1.95 billion. **(Argaam)**

Service exports down 3% to SAR 71.3B in Q1 2026; imports drop 3%

Saudi Arabia's service exports reached SAR 71.3 billion in Q1 2026, declining 3% year-on-year (YoY). Compared to Q4 2025, service exports rose by 8% or SAR 5.2 billion, according to the International Trade in Services Statistics issued by the General Authority for Statistics (GASTAT). **(Argaam)**

Retal inks SAR 123.8M deals with ROSHN to develop 163 units

Retal Urban Development Co. signed, on July 1, two agreements with PIF-owned ROSHN Group for developing 163 residential units in AlManar Community in Makkah. In a Tadawul statement, the company said the deals value is SAR 123.83 million, noting that the agreements are conditional agreements to purchase and develop lands for residential use. **(Argaam)**

Somou signs management contract with Arch 3 Real Estate Development

Somou Real Estate Co. signed on July 1 a project development management contract with Arsh Real Estate on behalf of Arsh Real Estate Fund 3. In a statement to Tadawul, Somou said it received a development management fee equal to 10% of construction costs, a marketing fee of 3% of project's total sales and a real estate brokerage commission of 2.5% of sales. **(Argaam)**

Red Sea receives land from Madinah Municipality to develop mixed-use building

Red Sea International Co. (RSI) said it received a land plot in Madinah from the Madinah Regional Municipality to develop, operate, and maintain a mixed-use building, following the completion of all procedures via the Furas platform. **(Argaam)**

Global

US job growth likely cooled in June after recent string of big gains

U.S. job growth likely slowed to a still-solid clip in June, with the unemployment rate expected to hold steady at 4.3% for a fourth straight month, consistent with a stable labor market. The anticipated moderation would follow three consecutive months of strong and above-expectations gains in nonfarm payrolls. Economists expected the Labor Department's closely watched employment report on Thursday to keep a September interest rate hike from the Federal Reserve on the table amid rising inflation from the U.S.-led war with Iran. **(Reuters)**

Japan shifts to ambush intervention tactics against yen short sellers, sources say

Japanese officials are abandoning their habit of telegraphing intervention risks, instead signalling a more targeted campaign to squeeze speculators and raise the cost of betting against the battered yen, two sources familiar with the matter said. **(Reuters)**

Commodities

Oil falls for a third straight day after US, Iran talks conclude in Doha

Oil prices dropped about 1% on Thursday, down for a third consecutive day, after Qatar said Iran and the U.S. had made progress in indirect talks focused on the Strait of Hormuz, which handled one-fifth of global oil supply before the war. The discussions produced "positive progress" on issues related to the memorandum that halted the war in June, a Qatar Foreign Ministry spokesperson said in a post on X. **(Reuters)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics						
		30-Jun	01-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2238	2250	0.5%	0.0%	0.9%
Value	mn	5477	4982	-9.0%	0.0%	-3.9%
Volume	mn	294	283	-3.8%	0.0%	12.0%
NOMU						
Market Cap	mn	7436	7391	-0.6%	0.0%	-2.6%
Value	mn	15.2	11.5	-24.5%	0.0%	-52.5%
Volume	mn	1.7	2.0	18.1%	0.0%	-17.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
DKHOUN	66.9	5.9	10%
ALHASOOB	37.98	2.98	9%
ALMUJTAMA MEDICAL	24	1.7	8%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
KEIR	1.49	-0.45	-23%
DRC	24.02	-3.98	-14%
TMC	9.05	-0.94	-9%

Source: Tadawul

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
CMCER	6.27	0.57	10%
AMANA INSURANCE	8.17	0.74	10%
BAAN	2.23	0.18	9%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	29.42	-2.46	-8%
SARCO	51.6	-2.6	-5%
SAUDI CABLE	160	-7.7	-5%

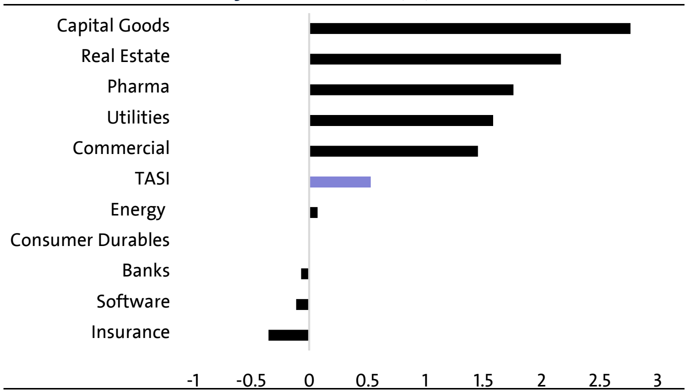
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.11	0.02	1%	18.0
SAUDI DARB	2.27	-0.02	-1%	16.3
BAAN	2.23	0.18	9%	15.1

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
RASAN	153.5	-1.1	-1%	267
SFICO	78.45	-0.55	-1%	229
ALRAJHI	66	0.1	0%	223

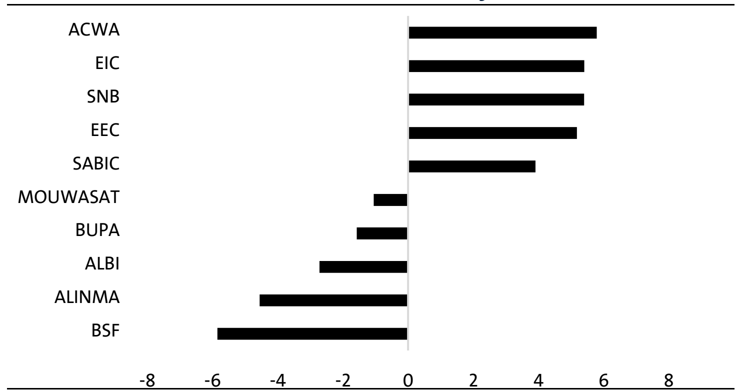
Source: Tadawul

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
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
07-Jul	U.S.	10-Year Note Auction	Jun		4.47%

Source: Bloomberg, Investing.Com

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