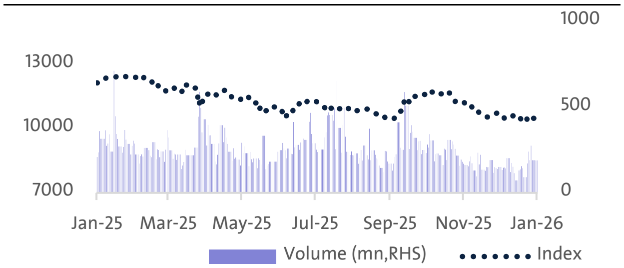
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	05-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10799	-0.3%	-0.5%	2%	14.0	1.6
NOMU	22690	-1.0%	-1.0%	-4%	0.0	1.6
S&P500	7483	0.0%	0.0%	9%	21.8	5.7
Dow Jones	52900	0.0%	1.1%	10%	13.3	6.1
FTSE 100	10679	0.2%	1.9%	8%	13.3	2.3
EuroStoxx50	6413	0.8%	2.1%	11%	16.4	2.6
Nikkei225	69744	1.5%	-1.0%	39%	24.6	3.1
MSCI EM	1722	2.2%	0.0%	22%	12.3	2.5
SHCOMP	4044	0.4%	-1.7%	2%	14.3	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
05-Jul	103	153	14	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	05-Jul	Δ bps	YTD Av	03-Jul	Δ bps	YTD Av
1M	4.63	0.7	5.6	3.67	0.3	4.3
3M	4.83	8.2	5.4	3.75	0.2	4.3
6M	5.21	10.8	5.5	3.87	0.4	4.2
12M	4.93	0.2	5.2	4.03	1.4	4.0

Commodities

		06-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	76	-0.4	135	60	-11.7
Brent	USDbbl	72	0.3	118	59	-10.9
Gold	USDOz	4174	0.5	5502	3277	-13.0
Silver	USDOz	62	-1.0	117	36	-36.5
Aluminum	USDton	3083	0.0	3851	2553	-14.0
Copper	USDton	13345	0.0	14140	9594	-15.9

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

Saudi PMI hits 4-months high at 53.3 pts in June

The seasonally adjusted Riyad Bank Saudi Arabia Purchasing Managers' Index (PMI), formerly S&P Global Saudi Arabia PMI, rose to 53.3 points in June, marking its highest level in four months. **(Argaam)**

Emaar EC signs SAR 547.4M contract with Nesma & Partners

Emaar The Economic City (Emaar EC) signed on July 5 a SAR 547.4 million (excluding VAT) contract with Nesma & Partners Co. for construction of infrastructure networks within the Special Economic Zone (SEZ) at the Industrial Valley in King Abdullah Economic City (KAEC). The 18-month contract is expected to begin contributing to the company's financial results in Q3 2026. **(Argaam)**

Naqi Water inks SAR 17.6M contract to buy bottled water caps machinery

Naqi Water Co. signed a contract worth about SAR 17.58 million (excluding VAT) for the procurement and installation of machinery designed for the manufacturing of bottled water caps at the company's main plant. **(Argaam)**

CMA approves Dallah Health 20% capital hike via bonus shares

Saudi Arabia's Capital Market Authority (CMA) approved Dallah Healthcare Co.'s request to increase its capital to SAR 1.22 billion from SAR 1.02 billion. In a statement, the CMA said the increase will be carried out through the distribution of one bonus share for every five existing shares (1-to-5) held. **(Argaam)**

Anaam appoints financial advisor to acquire 51% of Masar Al-Ola

Anaam International Holding Group signed today, July 5, an agreement to appoint Watheeq Capital as the financial advisor to manage the acquisition of up to a 51% stake in Masar Al-Ola Trading Co. **(Argaam)**

Global

Bank of England could boost bond demand with leverage rule tweak, banks say

The Bank of England could give Britain's government bond market a boost this week and lower public borrowing costs by more than £1 billion ($1.3 billion) a year, banks say — but some former regulators warn a change in rules to achieve this would increase financial risks. **(Reuters)**

Yen pinned near 40-year lows as intervention risks mount

The Japanese yen floundered around four-decade lows on Monday amid mounting intervention risks, while the dollar steadied as investors weighed the U.S. rates outlook after a soft jobs report dented bets of a near-term Federal Reserve. **(Reuters)**

Commodities

Brent crude oil price falls below $72/barrel

Oil prices fell today, July 6, as markets assessed the OPEC+ increase in production targets starting in August, coinciding with the gradual easing of export flows from major producers through the Strait of Hormuz, which reinforces expectations of growth in global supply. A Reuters survey showed that OPEC's oil production rose in June by 3.3 million barrels per day on a monthly basis to 19.43 million barrels per day. **(Argaam)**

Oil drifts down after OPEC+ agrees to raise output targets

Oil prices inched lower on Monday after OPEC+ agreed to further increase its output targets from August while exports from key producers via the Strait of Hormuz are recovering, potentially adding to global supplies. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		02-Jul	05-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2244	2262	0.8%	0.5%	1.4%
Value	mn	4320	4320	0.0%	-3.7%	-16.3%
Volume	mn	257	197	-23.2%	-15.6%	-21.8%
NOMU						
Market Cap	mn	7397	7320	-0.6%	0.0%	-2.6%
Value	mn	9.8	0.0	-24.5%	0.0%	-52.5%
Volume	mn	2.0	1.8	18.1%	0.0%	-17.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TMC	9.8	0.75	8%
NBM	47.4	3.4	8%
ALHASOOB	43.94	2.94	7%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
KEIR	1.35	-0.19	-12%
DRC	21.5	-2.52	-10%
HKC	31.1	-3.02	-9%

Source: Tadawul

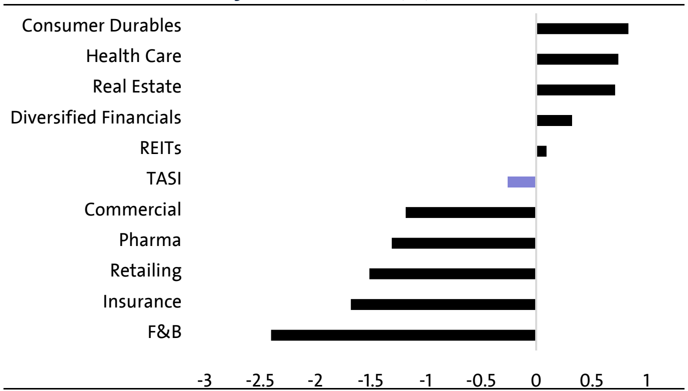
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TADCO	7.89	0.71	10%
NASEEJ	31.3	2.3	8%
RED SEA	26.42	1.42	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SFICO	69.85	-7.75	-10%
EAST PIPES	202	-14	-6%
TAPRCO	17.05	-0.95	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI DARB	2.46	0.12	5%	27.0
SIECO	2.52	0.1	4%	14.0
BATIC	2.22	-0.01	0%	10.9
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	65.7	-0.3	0%	200
RASAN	147.5	-0.5	0%	117
RED SEA	26.42	1.42	6%	115

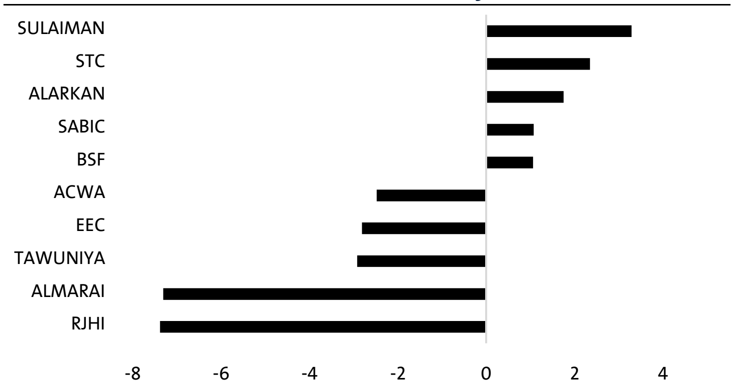
Source: Tadawul

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
06-Jul	U.S.	Services Purchasing Managers Index	Jun	51.1	50.7
08-Jul	U.S.	10-Year Note Auction	Jun		4.47%
09-Jul	U.K.	RICS House Price Balance	Jun		
09-Jul	U.S.	Initial Jobless Claims	Jun	219.0K	216.0K
09-Jul	C.N.	Consumer Price Index	Jun	1.3%	1.2%

Source: Bloomberg, Investing.Com

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