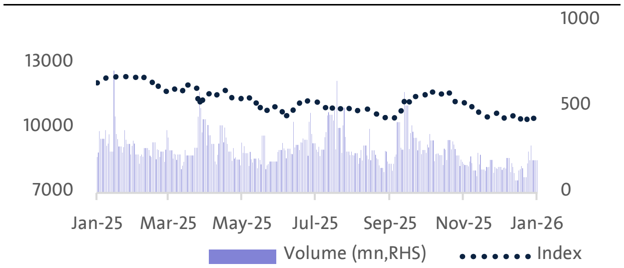
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	05-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	10990	-0.1%	-0.2%	4%	14.6	1.6
NOMU	23078	0.3%	0.5%	-2%	0.0	1.6
S&P500	7384	-2.6%	-2.8%	8%	21.7	5.8
Dow Jones	50867	-1.3%	-0.4%	6%	13.0	6.0
FTSE 100	10368	0.1%	0.3%	4%	13.0	2.3
EuroStoxx50	6062	-0.7%	0.4%	5%	15.8	2.5
Nikkei225	66588	-1.3%	-0.5%	32%	23.9	3.1
MSCI EM	1717	-2.4%	-3.2%	22%	13.1	2.6
SHCOMP	4028	-0.7%	-0.7%	1%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
04-Jun	109	150	10	0.7:1

Money Market Yields

%	SAIBOR			Term SOFR		
	04-Jun	Δ bps	YTD Av	05-Jun	Δ bps	YTD Av
1M	4.61	-5.7	5.6	3.61	0.1	4.3
3M	4.76	-13.7	5.4	3.65	0.0	4.3
6M	5.17	-9.9	5.5	3.72	0.6	4.2
12M	4.88	6.7	5.2	3.87	2.3	4.0

Commodities

		05-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	105	-0.9	135	60	-10.1
Brent	USDbbl	93	-2.0	118	59	-9.9
Gold	USDOz	4463	0.0	5502	3277	-17.9
Silver	USDOz	68	-8.2	117	36	-34.2
Aluminum	USDton	3647	-2.4	3851	2446	-12.2
Copper	USDton	13763	-1.0	14140	9578	-13.6

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 energy minister visits Russia, calls for stable energy sector Saudi Arabia's energy minister met his Russian counterpart on Thursday and called for stabilization in the energy sector, as the Iran and Ukraine wars cut oil output from the two top OPEC+ producers and send prices soaring. OPEC+ is facing an unprecedented challenge in 2026 as the two wars force oil export cuts and render their output policy agreements symbolic. Added to that, the United Arab Emirates, an OPEC member for almost 60 years, shocked its fellow members in April by quitting the group. **(Zawya)**

Tasnee completes scheduled maintenance at ethylene, polyethylene plant

National Industrialization Co. (Tasnee) said it completed scheduled maintenance at its ethylene and polyethylene plant and has resumed commercial production, according to a Tadawul statement. Saudi Ethylene and Polyethylene Company (SEPC) is 60% owned by a Tasnee subsidiary. **(Argaam)**

Saudi chemical exports up 5%at SAR 82.3B in 2025

Saudi Arabia's exports of chemical products and related industries increased 5%year-on-year (YoY) to nearly SAR 82.3 billion in 2025. Chemicals and related products made up 22.5%of the Kingdom's non-oil exports, which totaled SAR 366.1 billion, according to GASTAT **(Argaam)**

Subscription to Sah product starts on June 7, return set at 4.60%

Individuals will start subscribing to the monthly issuance of the Shariah-compliant, government-backed savings product (Sah) on June 7. The sukuk are issued by the Ministry of Finance and are arranged by the National Debt Management Center (NDMC). The return was set at 4.60%, while the allocation will take place on June 16. The redemption period will run from June 21-23. Redemption amounts will be paid on June 28. **(Argaam)**

Miahona signs SAR 95M deal to acquire SHAS Water

Miahona Co. signed a share purchase agreement to acquire 100% of SHAS Water Co. Ltd., including the company's stakes in its subsidiaries, Miahona said in a statement to Tadawul. The deal is valued at SAR 95.01 million and may rise to a maximum of SAR 102.71 million if SHAS meets specified financial targets based on its audited financial statements for the fiscal year ending in 2025. **(Argaam)**

Global

Resilient US economy posts third straight month of strong job growth

The U.S. economy posted a third straight month of strong job gains in May, confirming the labor market was gaining traction after stumbling last year and giving the Federal Reserve more room to keep interest rates unchanged amid rising inflation due to the war in the Middle East. **(Reuters)**

Bank of Japan expected to raise rates this month, sources say

The Bank of Japan is expected to raise interest rates this month unless a sharp escalation in the Middle East conflict upends markets, three sources said, as rising fuel costs from the energy shock add to mounting price pressure in the economy. **(Reuters)**

Commodities

Oil prices fall 2% at close, post weekly gain

Oil prices fell at close on Friday amid hopes that the conflict in the Middle East could come to an end, although crude posted its first weekly gain in three weeks. Prices came under pressure after Oman said operations at Mina Al Fahal terminal were proceeding normally, denying a Reuters report that oil-loading activities had been suspended following an explosion near the mooring area. **(Reuters)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		03-Jun	04-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2283	2280	-0.1%	-0.1%	2.3%
Value	mn	5445	4347	-20.2%	-19.8%	-17.5%
Volume	mn	270	217	-19.4%	-19.3%	-15.9%
NOMU						
Market Cap	mn	7409	7422	0.2%	0.2%	-2.2%
Value	mn	26.0	16.7	-35.8%	-23.0%	-34.8%
Volume	mn	2.8	2.9	1.3%	4.7%	15.4%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
PAPER HOME	43.66	3.96	10%
TAQAT	10.06	0.91	10%
NBM	40.98	3	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
PRO MEDEX	85	-11	-12%
ALRASHID INDUSTRIAL	49	-6	-11%
HORIZON FOOD	34	-3.7	-10%

Source: Tadawul

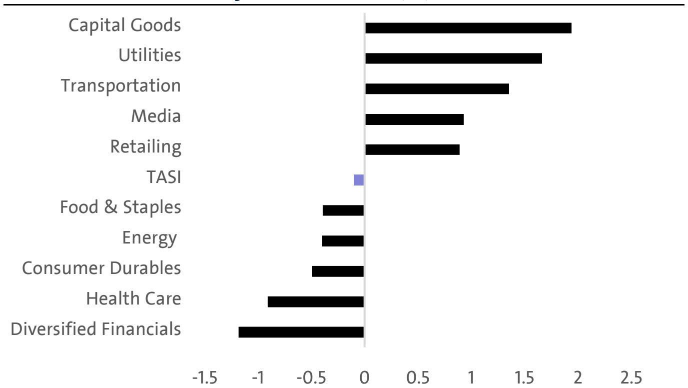
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
BUILD STATION	45.18	4.1	10%
GAS	16	1.45	10%
CENOMI RETAIL	14.05	1.27	10%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
KINGDOM	14.6	-0.8	-5%
PETRO RABIGH	15.03	-0.8	-5%
MEPCO	18.39	-0.8	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.96	0	0%	21.9
DBS	13.35	0.51	4%	18.5
SAUDI ARAMCO	27.16	-0.1	0%	14.5
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27.16	-0.1	0%	393
ALRAJHI	66.65	-0.1	0%	340
DBS	13.35	0.51	4%	246

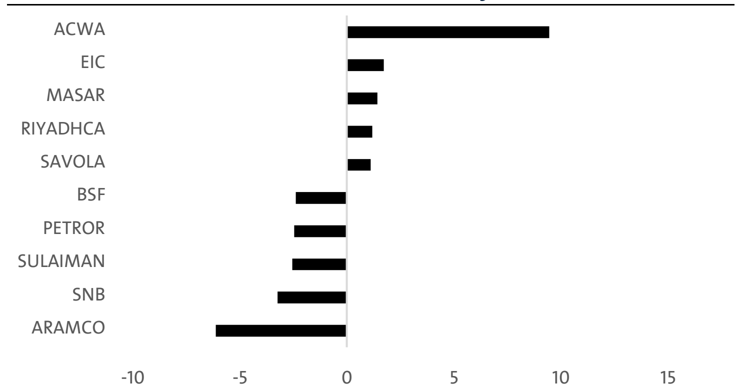
Source: Tadawul

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
07-Jun	BINDAWOOD	Ex-Dividend
07-Jun	FUTURE CARE	Ex-Dividend
08-Jun	TALCO	Ex-Dividend
09-Jun	SPIMACO	Ex-Dividend
09-Jun	Yanbu cement	Ex-Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
09-Jun	U.S.	Existing Home Sales	May	4.05M	4.01M
10-Jun	U.S.	10-Year Note Auction	May		4.282%
11-Jun	E.U.	Deposit Facility Rate	Jun	2.0%	2.0%
11-Jun	U.S.	Initial Jobless Claims	May	214. 0K	212. 0K
12-Jun	U.K.	GDP (MoM)	Apr	-0.1%	4.282%

Source: Bloomberg, Investing.Com

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