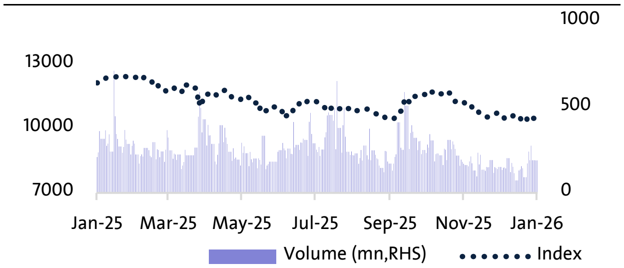
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	07-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10852	0.4%	0.0%	3%	14.1	1.6
NOMU	22667	0.0%	-1.1%	-4%	0.0	1.6
S&P500	7504	-0.4%	0.3%	10%	21.8	5.7
Dow Jones	52925	-0.2%	1.2%	10%	13.3	6.1
FTSE 100	10666	0.1%	1.8%	7%	13.3	2.4
EuroStoxx50	6320	-1.2%	0.6%	9%	16.2	2.6
Nikkei225	68257	-2.1%	-3.1%	36%	24.1	3.1
MSCI EM	1687	-2.0%	-2.0%	20%	12.5	2.5
SHCOMP	3990	-1.3%	-3.0%	1%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
07-Jul	118	136	16	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	07-Jul	∆ bps	YTD Av	07-Jul	∆ bps	YTD Av
1M	4.76	13.4	5.6	3.67	-0.1	4.3
3M	4.84	1.2	5.4	3.73	-2.2	4.3
6M	5.28	7.2	5.5	3.84	-3.4	4.2
12M	4.90	-2.9	5.2	3.99	-3.6	4.0

Commodities

		07-Jul	∆	52-week		YTD Av
	Unit	USD	%	Hi	low	%∆
Arab Light	USDbbl	77	2.9	135	60	-11.7
Brent	USDbbl	74	3.0	118	59	-10.9
Gold	USDOz	4141	-0.4	5502	3277	-14.1
Silver	USDOz	60	-3.3	117	36	-36.5
Aluminum	USDton	3131	0.8	3851	2553	-14.0
Copper	USDton	13361	-0.1	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 Construction Index rises to 6-month high at 56.3 points in June

The seasonally-adjusted Al Rajhi Capital Saudi Construction Index, compiled by S&P Global, rose to 56.3 points in June 2026 from 51.2 points in May. The June reading marked a six-month-high, according to the data. **(Argaam)**

Academy of Learning inks SAR 405.14M training agreement with Hadaf

Academy of Learning Co. (AOL) signed a training contract with the Human Resources Development Fund (Hadaf) to implement employment-linked training and qualification programs worth SAR 405.14 million, including VAT. **(Argaam)**

Anmat inks SAR 37M contract with Ministry of Defense

Anmat Technology for Trading Co. signed a contract worth SAR 36.98 million (inclusive of VAT) with the Ministry of Defense. The company also noted that the related financial impact is expected to be reflected during H2 2026 and H1 2027. There are no related parties involved. **(Argaam)**

Thimar recommends SAR 130M capital increase via rights issue

Thimar Development Holding Co. said its board recommended on July 7 increasing the company's capital by SAR 130 million through a rights issue. Thimar's shareholders rejected in January the board's recommendation to increase capital by SAR 195 million through a rights issue. **(Argaam)**

Saudi cement sales rise 9% to 4.4M tons in June

Saudi Arabia's 17 cement companies sold a combined 4.39 million tons of cement in June 2026, up 9% from 4.03 million tons in the same month last year, according to data from Yamama Cement Co. Domestic cement sales increased at 11 companies, led by Umm Al-Qura Cement, which posted a 57% year-on-year (YoY) increase, followed by Saudi Cement with a 32% rise. **(Argaam)**

Global

Japan considers policy wording change as BOJ independence fears roil bonds

Japan's government is considering revising language on monetary policy in its economic blueprint, a draft obtained by Reuters showed, as market fears it is infringing on central bank independence push bond yields to multi-decade highs. The possible change highlights the balancing act facing Prime Minister Sanae Takaichi, whose dovish stance and preference for aggressive fiscal and monetary support have unsettled investors and intensified scrutiny of her administration's influence over policy as borrowing costs climb. **(Reuters)**

UK jobs market downturn eases as pay pressure pick up, survey shows

Britain's jobs market downturn eased slightly last month, according to a survey of recruitment companies on Wednesday that showed an upturn in temporary hiring and starting salaries. The monthly Report on Jobs from accountants KPMG and the Recruitment and Employment Confederation, a trade body, showed temporary billings growth rose to a more than three-year high in June, although permanent placements contracted. **(Reuters)**

Commodities

Oil rises as US strikes on Iran raise fears over shaky truce

Oil prices gained more than 2% on Wednesday after the U.S. military launched airstrikes against Iran and reimposed crude sales sanctions, raising fears their fragile truce was unravelling and Middle East supplies could be disrupted again. Brent crude futures gained $1.92, or 2.6%, at $76.08 a barrel at 0400 GMT. U.S. West Texas Intermediate crude climbed $1.82, or 2.6%, to $72.26 a barrel. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics						
		06-Jul	07-Jul	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2265	2273	0.4%	1.0%	1.9%
Value	mn	3800	4309	13.4%	4.4%	-16.1%
Volume	mn	243	216	-11.3%	-8.3%	-14.3%
NOMU						
Market Cap	mn	7311	7312	0.0%	-1.1%	-3.6%
Value	mn	15.6	12.0	-22.6%	-0.6%	-49.2%
Volume	mn	2.8	2.0	-27.7%	-4.5%	-17.9%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALRASHID INDUSTRIAL	34.94	2.74	9%
ALHASOOB	43.76	2.66	6%
ALMOHAFAZA EDUCATION	26.6	1.6	6%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
DAR ALMARKABAH	1.3	-0.1	-7%
KEIR	1.39	-0.08	-5%
LAMASAT	4.2	-0.24	-5%

Source: Tadawul

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SSP	52.8	3.8	8%
APC	7.12	0.44	7%
EAST PIPES	217	9.9	5%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SIECO	2.31	-0.1	-4%
UCA	3.26	-0.14	-4%
NASEEJ	29.72	-0.94	-3%

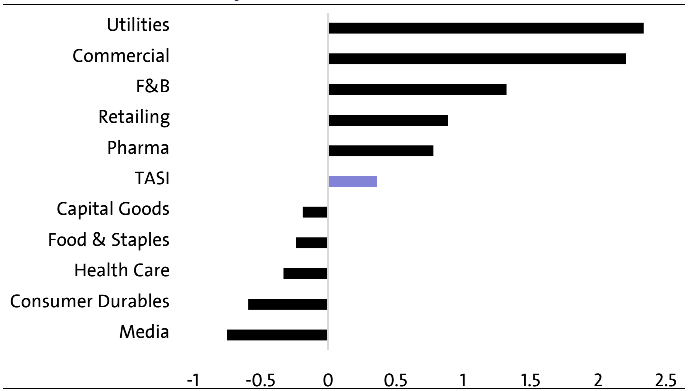
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI DARB	2.28	-0.04	-2%	13.5
APC	7.12	0.44	7%	12.8
SAUDI ARAMCO	26.16	0	0%	9.4

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	65.95	0.15	0%	294
SAUDI ARAMCO	26.16	0	0%	247
SFICO	79.7	2.9	4%	170

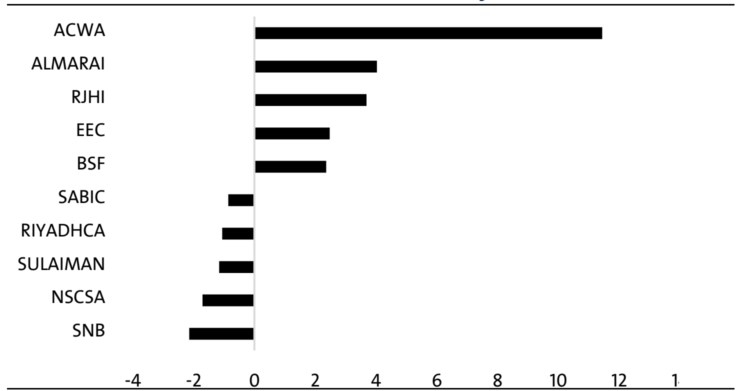
Source: Tadawul

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
08-Jul	DAR ALMARKABAH	General Assembly
09-Jul	KINGDOM	Cash Dividend
09-Jul	SHL	Cash Dividend
09-Jul	General Authority For Statistics	Report
12-Jul	SVCP	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
14-Jul	U.S.	Consumer Price Index	Jun	4.2%	3.8%

Source: Bloomberg, Investing.Com

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