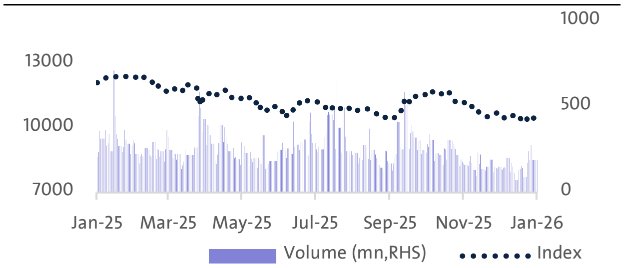
alinma capital الإنماء المالية

Daily Market Report

Key Indices-Return and Valuation

	15-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11096	0.5%	0.8%	5%	14.4	1.6
NOMU	22984	0.0%	0.1%	-2%	0.0	1.6
S&P500	7554	1.7%	-0.6%	10%	22.1	5.6
Dow Jones	51671	0.9%	1.2%	8%	13.0	5.9
FTSE 100	10431	-0.4%	0.9%	5%	13.0	2.4
EuroStoxx50	6229	0.7%	3.2%	8%	16.2	2.5
Nikkei225	69318	5.0%	3.6%	38%	24.6	3.1
MSCI EM	1764	2.8%	-0.5%	26%	12.7	2.5
SHCOMP	4096	1.6%	1.0%	3%	14.5	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
15-Jun	165	88	17	1.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	15-Jun	Δ bps	YTD Av	13-Jun	Δ bps	YTD Av
1M	4.63	-1.6	5.6	3.63	0.8	4.3
3M	4.77	2.3	5.4	3.67	0.6	4.3
6M	5.06	-8.0	5.5	3.75	0.5	4.2
12M	4.84	-4.0	5.2	3.91	-0.1	4.0

Commodities

		15-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	92	-4.7	135	60	-10.9
Brent	USDbbl	83	-4.8	118	59	-10.5
Gold	USDOz	4338	2.7	5502	3277	-18.3
Silver	USDOz	70	2.9	117	36	-34.9
Aluminum	USDton	3358	-4.9	3851	2503	-12.9
Copper	USDton	13750	0.7	14140	9578	-14.3

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

Strait of Hormuz to reopen fully by Friday: Trump

US President Donald Trump said the Strait of Hormuz would fully reopen by June 19 following the signing of an agreement with Iran. Speaking to reporters on June 15 ahead of the G7 Summit in France, Trump said the agreement had been signed electronically. He added that the strait, already partially open, will reopen fully after the official signing ceremony. **(Argaam)**

Projects awarded in May 2026 total SAR 30B: SCA

The Saudi Contractors Authority (SCA) stated that May recorded the highest value of projects awarded in 2026, with a total value exceeding SAR 30 billion, through 18 projects awarded across various regions of the Kingdom, while April had the highest number of projects at 23. **(Argaam)**

Alinma Bank plans to redeem SAR 5B AT1 capital sukuk

Alinma Bank announced its intention to redeem its SAR 5 billion Additional Tier 1 (AT1) capital sukuk on July 1, 2026, in full, at face value. The sukuk were issued on July 1, 2021, in the aggregate face amount of SAR 5 billion qualifying as AT1 capital in accordance with the Saudi Central Bank (SAMA) regulations, the bank said in a statement to Tadawul. **(Argaam)**

AJA Pharma signs medical marketing agreement with GSK

Saudi Chemical Holding Co. said its subsidiary, AJA Pharmaceutical Industries Co. (AJA Pharma), signed a non-exclusive agreement on June 15 with Glaxo Saudi Arabia Limited (GSK). In a statement to Tadawul, the company said the agreement covers the provision of medical marketing services for a wide range of GSK pharmaceutical products in Saudi Arabia through AJA Pharma's medical field teams **(Argaam)**

Anmat signs SAR 314.5M contract with Saudi Energy

Anmat Technology for Trading Co. signed a final contract with Saudi Energy Co. at an estimated value of SAR 314.5 million, including VAT, based on the award notice, according to a statement to Tadawul. **(Argaam)**

Global

China's industrial output growth quickens in May but retail sales and investment contract

China's industrial output rose 4.5% in May from a year earlier, picking up from 4.1% growth recorded in April, data from the National Bureau of Statistics (NBS) showed on Tuesday. Retail sales, a key gauge of consumption, shrank 0.6% last month, reversing April's 0.2% rise and below the estimated 0%. It marked the first monthly fall since December 2022. **(Reuters)**

Bank of Japan raises interest rates to 31-year high

The Bank of Japan raised interest rates to a 31-year high on Tuesday, marking another landmark step in normalising monetary policy as it focused on taming price pressures from the energy shock caused by the Iran war. The hike was the first since December and aligns the BOJ with other central banks shifting towards tighter policy to combat inflation, including the European Central Bank. **(Reuters)**

Commodities

Australia declares El Nino in Pacific that could become strongest in decades

Australia's weather bureau warned on Tuesday that an El Nino weather pattern has formed in the tropical Pacific and could intensify to become one of the strongest in seven decades. Sea surface temperatures in the region exceeded El Nino thresholds and atmospheric indicators all aligned with the phenomenon that brings extremes of weather, the Bureau of Meteorology said. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		14-Jun	15-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2301	2299	-0.1%	0.8%	3.1%
Value	mn	4174	6474	55.1%	17.8%	22.4%
Volume	mn	195	295	51.2%	17.6%	14.6%
NOMU						
Market Cap	mn	7433	7414	-0.2%	0.1%	-2.3%
Value	mn	14.8	21.8	47.3%	9.8%	-13.1%
Volume	mn	2.4	4.4	82.6%	61.7%	75.1%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
HILWA	2.68	0.19	8%
ALRASHID INDUSTRIAL	50.15	3.11	7%
HORIZON FOOD	34.02	1.98	6%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALMOHAFAZA EDUCATION	25	-2.68	-10%
LIME INDUSTRIES	12.18	-1.07	-8%
EDARAT	250.2	-19.2	-7%

Source: Tadawul

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	23.98	1.92	9%
FLYNAS	57.8	4	7%
SAUDI CEMENT	33.42	2.18	7%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
LUBEREF	117.2	-5.8	-5%
ADES	18.75	-0.75	-4%
BUPA ARABIA	186.9	-7.1	-4%

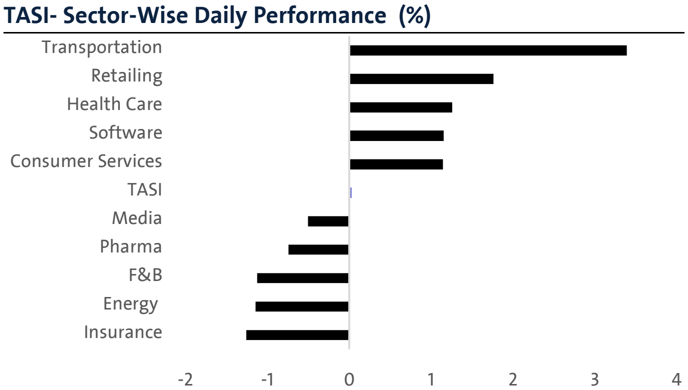
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2	0.05	3%	68.1
SAUDI ARAMCO	26.58	-0.3	-1%	16.7
ALRAJHI	66.7	-0.3	0%	10.5

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	66.7	-0.3	0%	705
SAUDI ARAMCO	26.58	-0.3	-1%	444
AMAK	76	1.5	2%	380

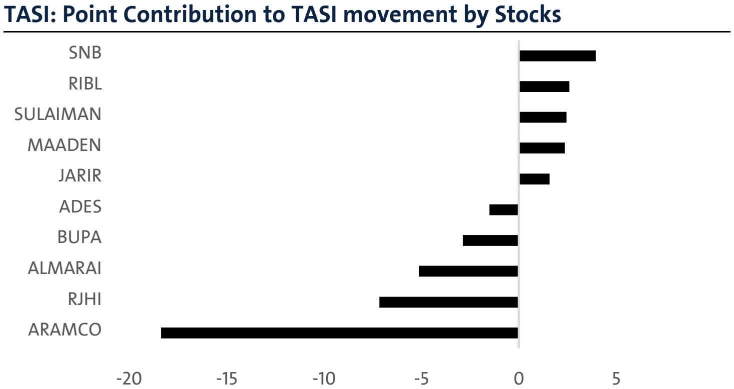
Source: Tadawul

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
16-Jun	SAUDI CEMENT	Ex-Dividend
16-Jun	EQUIPMENT HOUSE	Ex-Dividend
17-Jun	MSGA Investment	Start of offering
18-Jun	BUDGET SAUDI	Ex-Dividend
18-Jun	LEEJAM SPORTS	Ex-Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
17-Jun	U.S.	Fed Interest Rate Decision		3.75%	3.75%
18-Jun	U.K.	Bank of England Interest Rate Decision		3.75%	3.75%
24-Jun	U.S.	New Home Sales	May	661.00K	663.00K
25-Jun	U.S.	Core PCE Price Index YoY	May	3.3%	3.2%
30-Jun	C.N.	Manufacturing PMI (Jun)	May	50.2	50.3

Source: Bloomberg, Investing.Com

Contact Us:

Alinma Capital Company
Research Department (Sell-Side)
Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh 55560
Saudi Arabia
Phone: 011-2185555 =86309
E-mail: research@alinmacapital.com

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