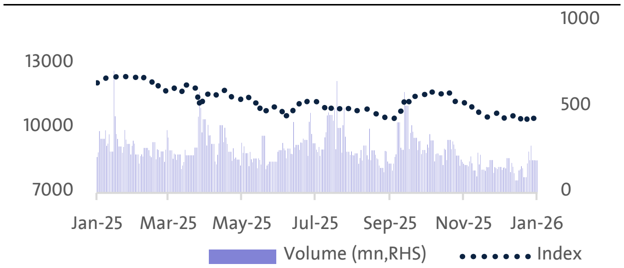
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	16-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11146	0.4%	1.2%	6%	14.5	1.6
NOMU	23221	1.0%	1.1%	-1%	0.0	1.6
S&P500	7511	-0.6%	-1.2%	10%	22.0	5.6
Dow Jones	52000	0.6%	1.8%	8%	13.1	5.9
FTSE 100	10494	0.6%	1.5%	6%	13.1	2.4
EuroStoxx50	6257	0.4%	3.7%	8%	16.3	2.5
Nikkei225	69405	0.1%	3.7%	38%	24.6	3.1
MSCI EM	1775	0.6%	0.1%	26%	13.0	2.5
SHCOMP	4092	-0.1%	0.8%	3%	14.5	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
16-Jun	115	141	14	0.8:1

Money Market Yields

%	SAIBOR			Term SOFR		
	16-Jun	Δ bps	YTD Av	16-Jun	Δ bps	YTD Av
1M	4.72	7.5	5.6	3.64	0.3	4.3
3M	4.80	5.2	5.4	3.67	-0.3	4.3
6M	5.12	-2.7	5.5	3.73	-1.7	4.2
12M	4.87	-1.1	5.2	3.89	-2.8	4.0

Commodities

		16-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	89	-3.3	135	60	-10.9
Brent	USDbbl	79	-5.1	118	59	-10.5
Gold	USDOz	4343	0.1	5502	3277	-18.3
Silver	USDOz	70	0.0	117	36	-34.9
Aluminum	USDton	3372	0.4	3851	2516	-12.9
Copper	USDton	13765	0.1	14140	9594	-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

Investment licenses in Saudi Arabia jump 68% in Q1 2026

The Ministry of Investment issued nearly 7,742 licenses in Q1 2026, an 68% year-on-year (YoY) increase, after excluding licenses issued under the National Anti-Commercial Concealment Program (Tasattur). The ministry noted that the increase reflects the Kingdom's position as an attractive investment destination, backed by strong competitive advantages, including a stable and business-friendly investment environment, according to its latest Economy and Investment Monitor report. **(Argaam)**

flynas expects summer travel demand to rise on improved regional conditions

Saudi-listed flynas expects travel demand to grow during this summer across both domestic and international markets, aided by improving regional conditions, the stabilization of air traffic, and strong seasonal demand for travel and tourism, CEO Bander Almohanna told Argaam. **(Argaam)**

Bank AlJazira issues USD-denominated AT1 capital certificates

Bank AlJazira started the issuance of USD-denominated additional Tier 1 (AT1) certificates, through a special purpose vehicle (SPV), via an offering to eligible investors inside and outside Saudi Arabia, under its USD 1.5 billion AT1 Capital Certificate Issuance Program. According to a statement to Tadawul, the amount and terms of offer of the certificates will be determined subject to market conditions. **(Argaam)**

Aslak rejects board pay, approves interim dividends for 2026

United Wire Factories Co. (Aslak) said its shareholders rejected the approval of SAR 1.25 million in remuneration for the Chairman and members of the board of directors for the year ended Dec. 31, 2025, during an extraordinary general meeting (EGM) held on June 16. **(Argaam)**

Global

UK inflation unexpectedly holds steady at 2.8% in May

British inflation unexpectedly held at 2.8% for May, unchanged from the 13-month low reached in April, official figures showed on Wednesday, a day before the Bank of England will announce its next interest rate decision. Sterling weakened slightly after the data. Economists polled by Reuters had forecast a rise to 3.0% for May, as the U.S.-Iran war keeps British inflation almost a percentage point higher than the BoE had forecast in January. **(Reuters)**

Commodities

Spot oil premiums retreat to pre-war levels

Spot premiums for crude oil and some refined products in Asia fell back to pre-war levels following the US-Iran agreement to end the Middle East conflict. However, uncertainty over the timing of the full reopening of the Strait of Hormuz continues to provide support to oil markets. **(Argaam)**

Oil extends fall, stocks steady as traders wait on Warsh

Sinking crude prices on news that Iranian fuel may soon hit global markets heralded inflation relief and pushed bond yields lower on Wednesday, while stocks and currencies were quieter ahead of Kevin Warsh's debut meeting as Federal Reserve chair. Brent crude futures have dived below $80 and are down more than one-third from peaks after reports the U.S. will waive sanctions on Iranian oil, under the deal to end the war. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics						
		15-Jun	16-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2299	2310	0.4%	1.2%	3.6%
Value	mn	6474	4609	-28.8%	-12.8%	-12.5%
Volume	mn	295	229	-22.4%	-6.2%	-10.7%
NOMU						
Market Cap	mn	7414	7491	1.0%	1.1%	-1.3%
Value	mn	21.8	15.5	-29.0%	-18.6%	-37.9%
Volume	mn	4.4	3.2	-27.1%	20.4%	27.9%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ANMAT	7.7	0.8	12%
FADECO	43.9	3.9	10%
RIYAL	14.32	1.2	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NAF	30.3	-3.3	-10%
PAPER HOME	37.5	-3.38	-8%
MUFEED	34.2	-2.78	-8%

Source: Tadawul

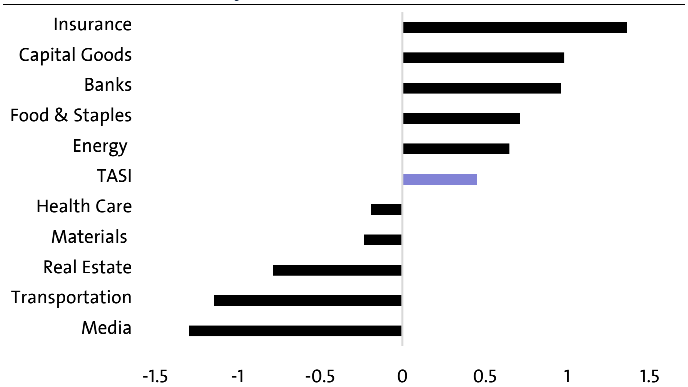
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TADCO	6.75	0.37	6%
BUPA ARABIA	196.6	9.7	5%
DWF	98.95	4.55	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SAUDI CABLE	181.4	-8.6	-5%
BUDGET SAUDI	34.88	-1.02	-3%
NICE ONE	14.2	-0.37	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.03	0.03	2%	55.9
SAUDI ARAMCO	26.76	0.18	1%	8.0
ALRAJHI	67.5	0.8	1%	7.5
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67.5	0.8	1%	506
SAUDI ARAMCO	26.76	0.18	1%	213
SNB	41.3	0.32	1%	159

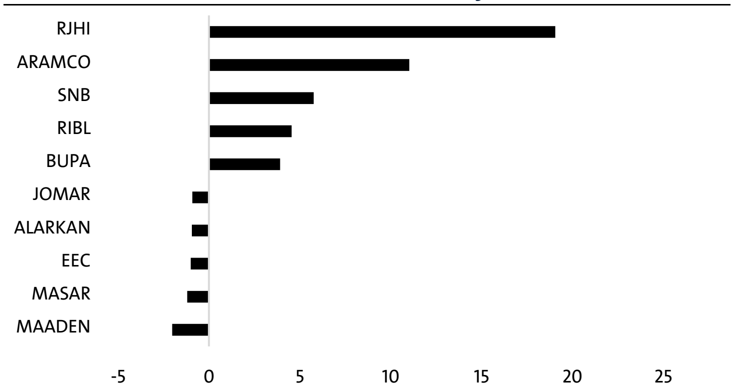
Source: Tadawul

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
17-Jun	MSGA Investment	Start of offering
18-Jun	BUDGET SAUDI	Ex-Dividend
18-Jun	LEEJAM SPORTS	Ex-Dividend
21-Jun	LUMI	General assembly
22-Jun	SHL	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

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