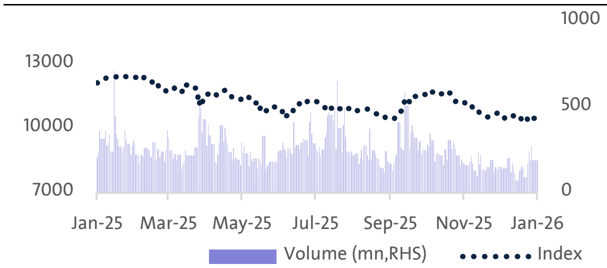
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	17-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11115	-0.3%	1.0%	5%	14.4	1.6
NOMU	23186	-0.2%	1.0%	-1%	0.0	1.6
S&P500	7420	-1.2%	-2.4%	8%	21.7	5.7
Dow Jones	51493	-1.0%	0.8%	7%	13.1	6.0
FTSE 100	10509	0.1%	1.6%	6%	13.1	2.4
EuroStoxx50	6300	0.7%	4.4%	9%	16.4	2.5
Nikkei225	69902	0.7%	4.4%	39%	24.8	3.2
MSCI EM	1783	0.4%	0.5%	27%	13.1	2.6
SHCOMP	4108	0.4%	1.2%	4%	14.6	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
17-Jun	72	182	16	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	17-Jun	∆ bps	YTD Av	17-Jun	∆ bps	YTD Av
1M	4.65	0.6	5.6	3.64	0.1	4.3
3M	4.69	-5.4	5.4	3.67	0.0	4.3
6M	5.09	-5.3	5.5	3.73	-0.3	4.2
12M	4.86	-1.9	5.2	3.87	-1.7	4.0

Commodities

		17-Jun	∆	52-week		YTD Av
	Unit	USD	%	Hi	low	%∆
Arab Light	USDbbl	89	0.6	135	60	-11.0
Brent	USDbbl	80	0.7	118	59	-10.6
Gold	USDOz	4332	-0.3	5502	3277	-18.3
Silver	USDOz	68	-3.0	117	36	-35.1
Aluminum	USDton	3409	1.1	3851	2521	-13.0
Copper	USDton	13806	0.3	14140	9594	-14.4

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 AUMs reach SAR 1.29T in Q1 2026

The total assets under management (AUM) held by capital market institutions in Saudi Arabia reached approximately SAR 1.29 trillion by the end of Q1 2026. SNB Capital topped the list of capital market institutions by AUM as of March 31, 2026, with nearly SAR 283.2 billion, accounting for 22% of total assets, according to the latest Capital Market Authority (CMA) report. **(Argaam)**

Rawasi Albina wins SAR 54M contract with SEC

Rawasi Albina Investment Co. won a project with Saudi Energy Co. (SEC) on June 17, with a total value of SAR 54 million, excluding VAT. The company said in a Tadawul filing that the project involves the replacement of transformers in Riyadh and Al Kharj. **(Argaam)**

Sign World extends 3 MoF agreements by 1-year

National Signage Industrial Co. (Sign World) received today, June 17, a notice from the Ministry of Finance extending the duration of three framework agreements previously disclosed in its IPO prospectus by an additional year for each contract. the company said the agreements include the supply of aluminum for vehicle plates valued at SAR 136.38 million, thermal embossing rolls for vehicle plates valued at SAR 8.98 million, and reflective films valued at SAR 68.12 million. **(Argaam)**

Riyadh: 71M sqm of white land developed or traded

The total area of white land in Riyadh under development or trading reached around 71 million square meters (sqm), the state-run Saudi Press Agency (SPA) reported, citing the Ministry of Municipalities and Housing. **(Argaam)**

MSGA starts Nomu IPO at SAR 6/share today

Qualified investors begin today, June 17, subscribing to 11.11 million shares of MSGA Investment Co. on the Nomu-Parallel Market, with the offering price set at SAR 6 per share. The offered shares represent 10% of the company's capital after the offering and capital increase, and 11.11% of its current capital before the offering, which stands at SAR 100 million, divided into 100 million shares with a nominal value of SAR 1 each. **(Argaam)**

Global

Trump signs agreement with Iran

President Donald Trump signed an agreement with Iran aimed at ending the conflict in the Middle East, a US official told Agence France-Presse (AFP). The signing reportedly took place during a dinner meeting with French President Emmanuel Macron on the sidelines of the G7 Summit. **(BBC)**

Fed officials rule out rate cuts in 2026

Federal Reserve policymakers no longer expect interest-rate cuts in 2026 and indicated that further tightening remains a possibility, though not a certainty, according to the quarterly projections released by members of the Federal Open Market Committee and regional Fed bank presidents. **(Argaam)**

Commodities

Oil slips again as US, Iran sign peace deal

Oil prices fell in early trading on Thursday after the U.S. and Iran signed an interim agreement that would end the Iran war, reopen the Strait of Hormuz and waive U.S. sanctions on Tehran's oil, resolving the largest energy supply disruption in history. Brent crude futures were down 89 cents, or 1.12%, at $78.66 a barrel as of 0005 GMT, and U.S. West Texas Intermediate fell 98 cents, or 1.28%, to $75.81 a barrel. **(Reuters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		16-Jun	17-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2310	2303	-0.3%	0.9%	3.3%
Value	mn	4609	4165	-9.6%	-19.5%	-20.7%
Volume	mn	229	171	-25.2%	-27.0%	-32.9%
NOMU						
Market Cap	mn	7491	7480	-0.2%	1.0%	-1.4%
Value	mn	15.5	19.6	26.8%	1.4%	-21.3%
Volume	mn	3.2	2.3	-29.1%	-11.5%	-8.9%

*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

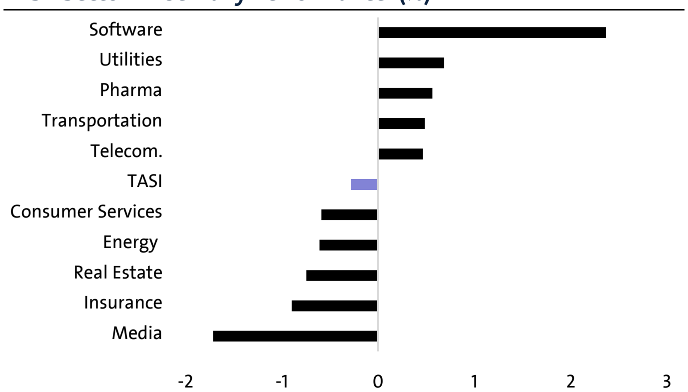
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
GIG	31.68	1.86	6%
ELM	737	24	3%
EAST PIPES	220	6.7	3%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
JAZIRA TAKAFUL	11.52	-0.6	-5%
SAUDI CEMENT	31.38	-1.42	-4%
PETRO RABIGH	12.7	-0.55	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.04	0.01	0%	15.8
SAUDI ARAMCO	26.6	-0.16	-1%	9.9
PETRO RABIGH	12.7	-0.55	-4%	6.2
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67.2	-0.3	0%	276
SAUDI ARAMCO	26.6	-0.16	-1%	263
ACWA	202.5	2	1%	161

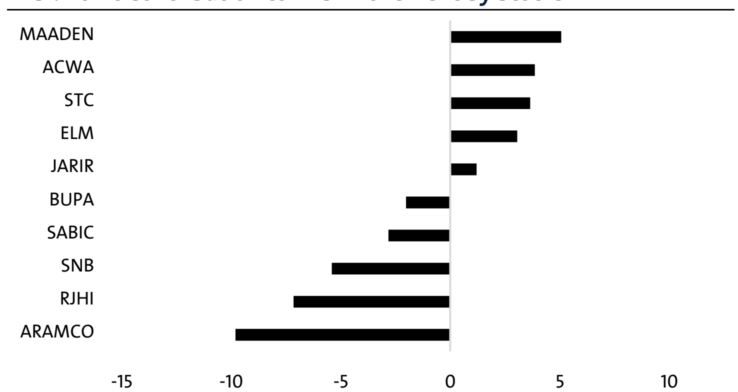
Source: Tadawul

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
18-Jun	BUDGET SAUDI	Ex-Dividend
18-Jun	LEEJAM SPORTS	Ex-Dividend
21-Jun	LUMI	General assembly
22-Jun	SHL	Ex-Dividend
22-Jun	CHERRY	Ex-Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
30-Jul	U.S.	Consumer Confidence	Jun	91.9	93.8

Source: Bloomberg, Investing.Com

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