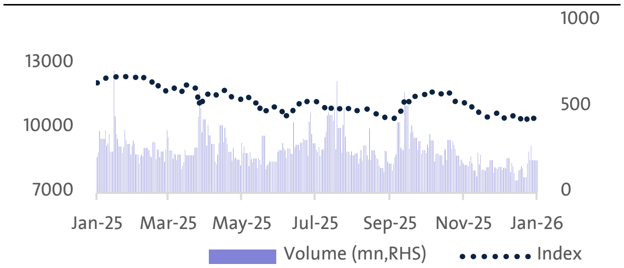
alinma capital الإنمــاء المالــية

Daily Market Report

Key Indices-Return and Valuation

	19-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11121	0.1%	1.0%	5%	14.5	1.6
NOMU	23229	0.2%	1.2%	-1%	0.0	1.6
S&P500	7501	0.0%	-1.3%	10%	21.9	5.7
Dow Jones	51565	0.0%	1.0%	7%	12.9	6.0
FTSE 100	10363	-0.4%	0.2%	4%	12.9	2.3
EuroStoxx50	6293	-0.5%	4.3%	9%	16.4	2.6
Nikkei225	71250	0.3%	6.4%	42%	25.2	3.3
MSCI EM	1786	-0.2%	0.7%	27%	13.2	2.6
SHCOMP	4090	0.0%	0.8%	3%	14.5	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
18-Jun	114	133	22	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	18-Jun	Δ bps	YTD Av	19-Jun	Δ bps	YTD Av
1M	4.66	1.7	5.6	3.64	0.4	4.3
3M	4.72	-2.1	5.4	3.70	1.9	4.3
6M	5.10	-3.8	5.5	3.79	4.2	4.2
12M	4.84	-4.4	5.2	3.94	6.4	4.0

Commodities

		19-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	89	0.6	135	60	-11.1
Brent	USDbbl	81	0.9	118	59	-10.6
Gold	USDOz	4165	-2.4	5502	3277	-18.5
Silver	USDOz	65	-1.2	117	36	-35.5
Aluminum	USDton	3400	0.3	3851	2553	-13.3
Copper	USDton	13600	-0.6	14140	9594	-14.8

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 Arabia sees 122.6M tourist arrivals in 2025; spending rises to SAR 303.7B

Saudi Arabia's tourism sector recorded positive performance during 2025, particularly in total tourist numbers and spending. The total number of inbound tourists rose to 122.6 million, an increase of 5.8% compared with 2024. Tourism spending also increased to SAR 303.7 billion, recording 7.0% growth. **(Argaam)**

Al Arabia signs 10-year advertising contracts for 18 Saudi airports

Arabian Contracting Services Co. (Al Arabia) said it signed several contracts on June 18 with Cluster2 Airports Co. for an advertising opportunity at 18 airports across Saudi Arabia for 10 years, according to a statement to Tadawul. The contract value will be based on revenue sharing from the project or the guaranteed minimum of SAR 120.49 million for the total contract term, excluding VAT, whichever is higher. **(Argaam)**

Masar to sell 3 land plots for 239.8M

Umm Al Qura for Development and Construction Co. (Masar) signed three agreements to sell three land plots within the Masar Destination project for SAR 239.8 million, excluding taxes and fees, according to a statement to Tadawul. The three plots are located in Zone 3 of the Masar Destination project in Makkah and span a total area of 6,904.62 square meters. **(Argaam)**

Cenomi Centers plans 8.98% capital hike via bonus issue, stock allocation

The board of Arabian Centres Co. (Cenomi Centers) recommended a 8.98% capital increase from SAR 4.75 billion to SAR 5.18 billion, according to a Tadawul statement. **(Argaam)**

Global

BOJ may raise interest rates twice by March, says ex-BOJ policymaker

The Bank of Japan may raise interest rates twice by the end of the current fiscal year, after making a landmark shift in its policy focus toward mounting inflation risk, former board member Makoto Sakurai said on Friday. The central bank justified Tuesday's decision to raise its short-term policy rate to a 31-year high of 1% to forestall the risk of underlying inflation exceeding its 2% target. **(Reuturs)**

Higher inflation drives jump in UK budget deficit in May

British government borrowing jumped much more sharply than expected in May as higher inflation pushed up the cost of servicing index-linked debt, in unwelcome news for the public finances. Britain's government ran a budget deficit of £23.3 billion ($30.7 billion) in May, up 30% on a year earlier, official figures showed on Friday. That was above all economists' expectations in a Reuters poll which had pointed to a little-changed reading of £18.5 billion. **(Reuturs)**

Commodities

Iran closes Hormuz on US-ally violations of ceasefire agreement: Report

Iran's Khatam al-Anbiya Central Headquarters, the country's top joint military command, said on Saturday that the Strait of Hormuz would be closed to maritime traffic following what it described as US and Israeli violations of the ceasefire agreement, Iran's semi-official Mehr News Agency reported. **(Argaam)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		17-Jun	18-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	%
TADWEEER	5.22	0.47	10%
TIME	26.8	2.3	9%
ASAS MAKEEN	24	2	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
BALSM MEDICAL	23.34	-2.58	-10%
LANA	2.74	-0.24	-8%
SERVICE EQUIPMENT	23.74	-1.56	-6%

Source: Tadawul

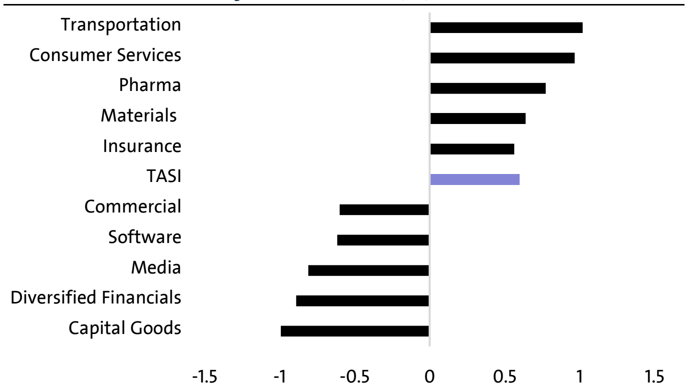
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
LIVA	13.2	0.88	7%
ALMUNAJEM	66	2.95	5%
MIS	213.8	8.2	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALETIHAD	6.33	-0.2	-3%
KINGDOM	12.72	-0.38	-3%
THIMAR	33.62	-0.98	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.1	0.06	3%	39.1
SAUDI ARAMCO	26.52	-0.08	0%	22.8
PETRO RABIGH	12.4	-0.3	-2%	14.4
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.52	-0.08	0%	605
MAADEN	64.8	1.95	3%	530
ALRAJHI	66.75	-0.45	-1%	528

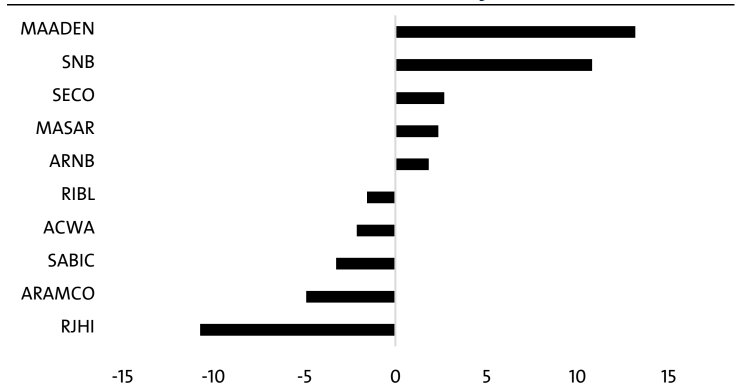
Source: Tadawul

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
21-Jun	LUMI	General assembly
22-Jun	SHL	Ex-Dividend
22-Jun	CHERRY	Ex-Dividend
24-Jun	BURGERIZZR	Ex-Dividend
24-Jun	MSGA	Close of offering

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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-Jun	U.S.	Consumer Confidence	Jun	91.9	93.8
01-Jul	E.U.	Consumer Price Index	Jun	3.2%	3.2%

Source: Bloomberg, Investing.Com

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