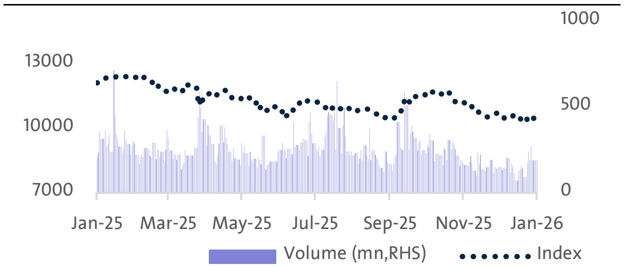
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	21-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11077	-0.4%	0.6%	5%	14.4	1.6
NOMU	23202	-0.1%	1.1%	-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	0.0%	0.2%	4%	12.9	2.3
EuroStoxx50	6293	0.0%	4.3%	9%	16.4	2.5
Nikkei225	71250	0.0%	6.4%	42%	25.2	3.3
MSCI EM	1786	0.0%	0.7%	27%	13.1	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
21-Jun	95	164	11	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	21-Jun	Δ bps	YTD Av	19-Jun	Δ bps	YTD Av
1M	4.66	1.2	5.6	3.64	0.4	4.3
3M	4.72	3.2	5.4	3.70	1.9	4.3
6M	5.10	1.6	5.5	3.79	4.2	4.2
12M	4.84	-2.5	5.2	3.94	6.4	4.0

Commodities

		22-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	89	-0.1	135	60	-11.2
Brent	USDbbl	79	-2.0	118	59	-10.6
Gold	USDOz	4165	0.0	5502	3277	-18.6
Silver	USDOz	67	2.5	117	36	-35.6
Aluminum	USDton	3400	0.0	3851	2553	-13.4
Copper	USDton	13600	0.0	14140	9594	-14.9

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

Real estate deals reach SAR 22.6B in May

The value of real estate transactions in the Saudi market fell 77% to around SAR 22.6 billion last May, from SAR 96.5 billion in May 2025, weighed by weaker activity in both the residential and non-residential sectors. **(Argaam)**

Fuel adjustment raises costs by 4%: Yanbu Cement

Yanbu Cement Co. said the direct financial impact of the fuel price adjustment resulted in an increase in production costs of approximately 4%. The company said that this impact was reflected in its financial results for Q1 2026. **(Argaam)**

Sumou receives off-plan sales license for Makkah project

Sumou Real Estate Co. said an off-plan sales license was issued on June 21, for the Al Dhahiya Residence project in Makkah under License No. 1063, according to a statement to Tadawul. In April, Sumou signed an agreement to manage the development of the superstructure works for the Al Dhahiya Residence project in Makkah. **(Argaam)**

Foreign institutions net buyers of SAR 837.6M on TASI last week

Foreign institutions on the Main Market (TASI) were net buyers of stocks worth SAR 837.6 million during the week ended June 18, the Saudi Exchange (Tadawul) said in its latest weekly report. Foreign institutions accounted for 42.82% of total buy transactions and 39.62% of total sell trades on TASI.. **(Argaam)**

Saudi holdings of US T-bonds down $9.5B to $140.1B in April

Saudi Arabia's holdings of US Treasuries fell in April 2026 to $140.1 billion, declining by about $9.5 billion from a month earlier, according to data from the US Department of Treasury. The Kingdom maintained the 17th ranking among the largest holders of US debt in April. **(Argaam)**

Al Rajhi Capital, Umm Al Qura for Development, OSUS sign agreements to develop 3 residential towers at Masar Destination

Al Rajhi Capital, in partnership with Umm Al Qura for Development and Construction Co. (Masar), the master developer of Masar Destination, and OSUS Real Estate Co., announced the purchase of land within the Massar Destination project in Makkah's third zone to develop three residential towers with investments of nearly SAR 1 billion. **(Argaam)**

Global

China keeps lending benchmark LPRs unchanged for 13th month in June

China left benchmark lending rates unchanged for the 13th consecutive month in June on Monday, in line with market expectations. The one-year loan prime rate (LPR) was kept at 3.00%, while the five-year LPR was unchanged at 3.50% **(Reuturs)**

Commodities

Brent falls after US-Iran talks conclude in Switzerland

Brent crude prices slid on Monday after U.S.-Iran talks concluded in Switzerland with Tehran saying it had secured waivers for oil and petrochemical exports, easing worries about a supply shortage in global markets.Brent crude fell $1.19, or 1.48%, to $79.38 a barrel by 0416 GMT. Prices had climbed to $82.30 at the start of trading, fuelled by a bumpy start to the talks with threats from U.S. President Donald Trump to restart the war on Iran and Tehran's announcement it had again closed the Strait of Hormuz. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics						
		18-Jun	21-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2305	2295	-0.4%	0.6%	3.0%
Value	mn	6433	6433	0.0%	17.6%	21.5%
Volume	mn	256	162	-36.6%	-29.7%	-36.1%
NOMU						
Market Cap	mn	7494	7485	-0.1%	1.1%	-1.3%
Value	mn	19.6	0.0	-100.0%	-100.0%	-100.0%
Volume	mn	3.1	0.0	-99.9%	-99.9%	-99.9%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MOLAN	1.15	0.1	10%
DRC	43.4	3.4	9%
JAMJOOM FASHION	118.4	7.2	6%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
RIMATH	29	-2.06	-7%
ALMODAWAT	4.9	-0.34	-6%
ALASHGHAL ALMOYSRA	13.3	-0.63	-5%

Source: Tadawul

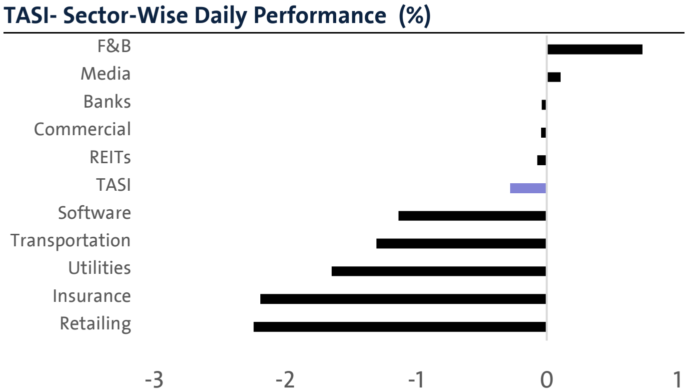
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SFICO	44.96	4.08	10%
TAMKEEN	48.48	1.86	4%
MAADANIYAH	12.35	0.45	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
LIVA	12.5	-0.7	-5%
JARIR	16.1	-0.64	-4%
BUDGET SAUDI	33.34	-1.14	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.09	-0.01	0%	30.5
BAAN	2.08	0.06	3%	9.8
PETRO RABIGH	12.56	0.16	1%	8.3
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67	0.25	0%	143
SAUDI ARAMCO	26.46	-0.06	0%	115
PETRO RABIGH	12.56	0.16	1%	107

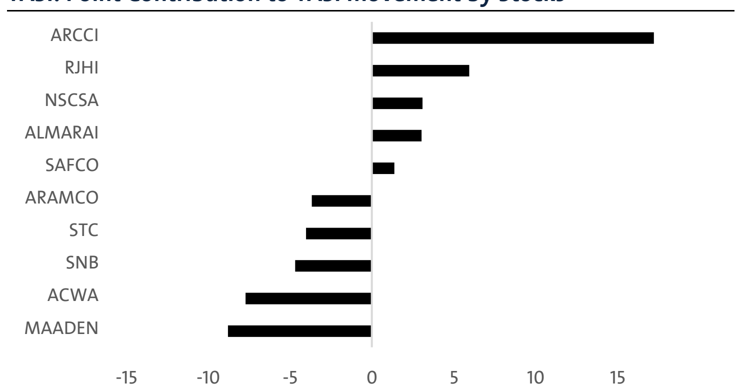
Source: Tadawul

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
22-Jun	SHL	Ex-Dividend
22-Jun	CHERRY	Ex-Dividend
24-Jun	BURGERIZZR	Ex-Dividend
24-Jun	MSGA	Close of offering
25-Jun	ALBABTAIN FOOD	Ex-Dividend

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

Daily Market Report

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