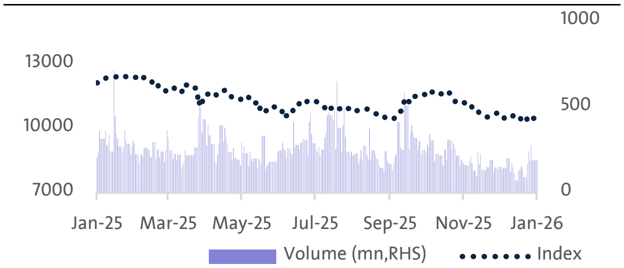
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	22-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11072	0.0%	0.6%	5%	14.4	1.6
NOMU	23227	0.1%	1.2%	-1%	0.0	1.6
S&P500	7473	-0.4%	-1.7%	9%	21.9	5.7
Dow Jones	51713	0.3%	1.2%	8%	12.9	6.0
FTSE 100	10438	0.7%	1.0%	5%	12.9	2.3
EuroStoxx50	6311	0.3%	4.6%	9%	16.1	2.5
Nikkei225	72354	1.5%	8.1%	44%	25.6	3.3
MSCI EM	1803	0.9%	1.7%	28%	13.2	2.6
SHCOMP	4163	1.8%	2.6%	5%	14.8	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
22-Jun	135	118	17	1.1:1

Money Market Yields

%	SAIBOR			Term SOFR		
	22-Jun	∆ bps	YTD Av	22-Jun	∆ bps	YTD Av
1M	4.68	1.6	5.6	3.64	0.4	4.3
3M	4.68	-4.3	5.4	3.70	1.9	4.3
6M	5.19	8.2	5.5	3.79	4.2	4.2
12M	4.87	3.3	5.2	3.94	6.4	4.0

Commodities

		23-Jun	∆	52-week		YTD Av
	Unit	USD	%	Hi	low	%∆
Arab Light	USDbbl	86	-1.1	135	60	-11.2
Brent	USDbbl	77	-1.4	118	59	-10.6
Gold	USDOz	4208	0.0	5502	3277	-18.6
Silver	USDOz	63	-3.9	117	36	-35.6
Aluminum	USDton	3361	0.0	3851	2553	-13.4
Copper	USDton	13712	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

MIS awarded contract by HUMAIN at over 30% of 2025 topline

Al Moammar Information Systems Co. (MIS) was awarded a contract for data center colocation services with PIF subsidiary HUMAIN, at a value exceeding 30% of its total revenues for 2025 (VAT inclusive), according to a Tadawul statement. The contract, expected to be signed on Sept. 22, entails the provision of data center colocation services, the company said. **(Argaam)**

Najran Cement inks deal with Industrial Competitiveness Program

Najran Cement Co. signed an agreement with the Industrial Competitiveness Program, which includes providing support for several solutions that help boost the capacity and type of sources of used energy. The program is intended to enhance operational efficiency, reduce production costs, and improve the sustainability of industrial operations, it said in a statement to Tadawul. **(Argaam)**

Naqi Water opens new Riyadh branch for table eggs

Naqi Water Co. announced the opening of a new branch in Riyadh dedicated to table eggs, in line with the completion of the project's first production phase and preparations for the second phase. **(Argaam)**

Qomel signs over SAR 214M framework agreements with nupco

Qomel Co. signed on June 22 two framework agreements with National Unified Procurement Co. (NUPCO), with a combined value of SAR 214.27 million, according to a statement to Tadawul. The agreements, valued at SAR 111.32 million and SAR 102.95 million, cover the supply of pharmaceuticals on demand and related services. **(Argaam)**

Al Sagr OGM approves filing liability lawsuit against 2 board members

Al Sagr Cooperative Insurance Co.'s shareholders approved, in an ordinary general meeting (OGM) on June 22, filing a liability lawsuit against Saud Al- Arifi in his capacity as former Chairman of the board and current board member and Yasser Al-Harbi as a board member and former managing director. **(Argaam)**

Cenomi Retail CEO resigns, Sameer Jain takes helm

AFG International's (Cenomi Retail) board of directors accepted today June 22, the resignation submitted by Salim Fakhouri from his position as CEO, at his own request, effective Oct. 31, coinciding with the expiry of his employment contract. **(Argaam)**

Global

Japan's factory activity expands at faster pace in June as new orders surge

Japan's manufacturing sector sustained robust growth in June, with new orders surging to their fastest pace in more than four years, though cost pressures continued to intensify due to the repercussions from the Iran war, a survey showed on Tuesday. **(Reuters)**

ECB not using neutral rate estimate to decide policy, Lagarde says

The European Central Bank's estimate for the neutral interest rate, which neither stimulates nor slows growth, is not used as an explicit goalpost by policymakers when setting interest rates, ECB President Christine Lagarde said on Monday. **(Reuters)**

Commodities

Oil falls 1% as investors focus on Hormuz flows after peace talks

Oil prices fell more than 1% on Tuesday, extending losses from the previous session, on signs of some progress in restoring crude flows through the Strait of Hormuz following U.S.-Iran peace talks.Brent crude futures fell $1.09, or 1.4%, to $76.81 a barrel **(Reuters)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		21-Jun	22-Jun	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2295	2294	0.0%	0.6%	2.9%
Value	mn	2759	3434	24.5%	-30.8%	-34.2%
Volume	mn	162	176	8.3%	-23.0%	-30.6%
NOMU						
Market Cap	mn	7485	7493	0.1%	1.2%	-1.2%
Value	mn	14.5	16.2	11.7%	-13.6%	-34.6%
Volume	mn	0.1	0.2	58.0%	-89.5%	-90.5%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TIME	30.3	3.5	13%
RIMATH	31.62	2.62	9%
ALDAWLIAH	5.55	0.36	7%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
WAJA	6.41	-0.74	-10%
APICO	49.8	-5.2	-9%
ALBATTAL FACTORY	14.14	-1.36	-9%

Source: Tadawul

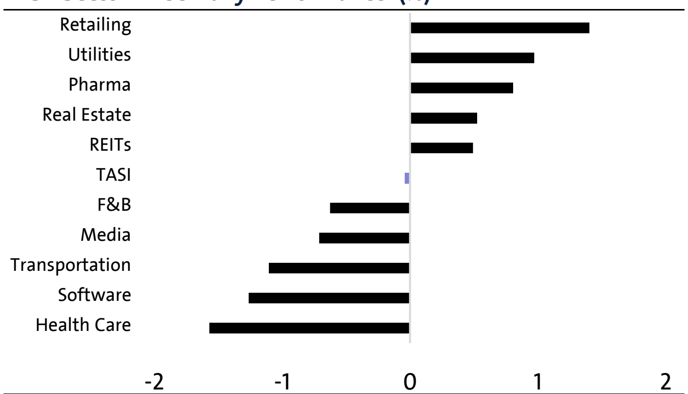
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SFICO	49.44	4.48	10%
THIMAR	34.96	1.72	5%
ALYAMAMAH STEEL	42.9	1.7	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALRAMZ	58.25	-1.9	-3%
PETRO RABIGH	12.2	-0.36	-3%
CARE	107.9	-3	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.05	-0.04	-2%	23.6
SAUDI DARB	2.14	-0.02	-1%	7.5
SAUDI ARAMCO	26.44	-0.02	0%	5.8
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67	0	0%	199
SAUDI ARAMCO	26.44	-0.02	0%	152
MAADEN	63	-0.5	-1%	90

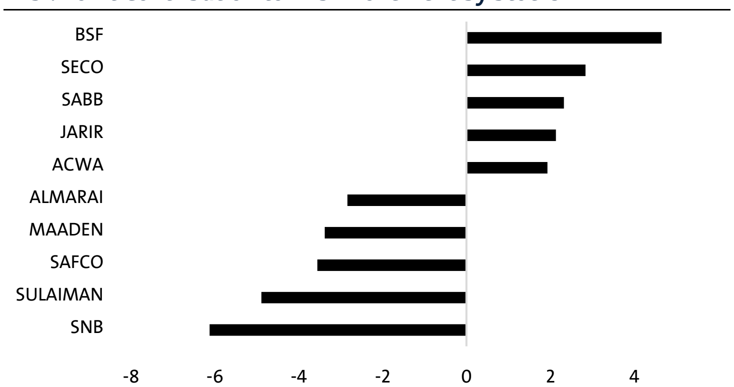
Source: Tadawul

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
24-Jun	BURGERIZZR	Ex-Dividend
24-Jun	MSGA	Close of offering
25-Jun	ALBABTAIN FOOD	Ex-Dividend
28-Jun	TAWUNIYA	Ex-Dividend
28-Jun	MSGA	final allocation date

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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