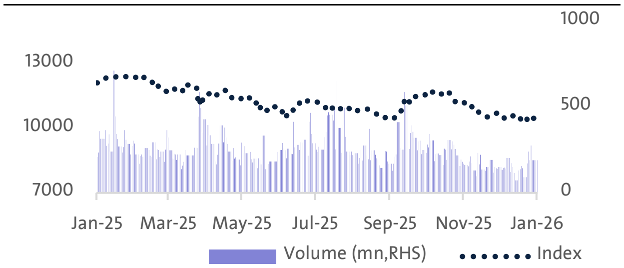
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	24-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	11007	-0.2%	0.0%	4%	14.3	1.6
NOMU	23056	0.2%	0.4%	-2%	0.0	1.6
S&P500	7358	-0.1%	-3.2%	7%	21.5	5.7
Dow Jones	51849	0.4%	1.5%	8%	12.9	6.0
FTSE 100	10462	0.3%	1.2%	5%	12.9	2.4
EuroStoxx50	6215	-0.3%	3.0%	7%	15.9	2.6
Nikkei225	69175	-0.9%	3.3%	37%	24.3	3.4
MSCI EM	1730	-0.2%	-2.4%	23%	12.8	2.6
SHCOMP	4111	0.1%	1.3%	4%	14.6	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
24-Jun	161	105	3	1.5:1

Money Market Yields

%	SAIBOR			Term SOFR		
	24-Jun	∆ bps	YTD Av	24-Jun	∆ bps	YTD Av
1M	4.60	-5.8	5.6	3.65	0.5	4.3
3M	4.66	-6.0	5.4	3.74	1.2	4.3
6M	5.23	12.5	5.5	3.88	2.8	4.2
12M	4.91	7.1	5.2	4.07	4.0	4.0

Commodities

		24-Jun	∆	52-week		YTD Av
	Unit	USD	%	Hi	low	%∆
Arab Light	USDbbl	83	-3.7	135	60	-11.2
Brent	USDbbl	74	-4.3	118	59	-10.6
Gold	USDOz	4070	-1.1	5502	3277	-18.7
Silver	USDOz	57	-6.8	117	36	-35.7
Aluminum	USDton	3106	-3.8	3851	2553	-13.5
Copper	USDton	13240	-1.2	14140	9594	-15.0

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 oil exports extend decline, hit 3.99M bpd in April

Saudi Arabia's crude oil exports declined to their lowest level during April 2026, falling by 20% month-on-month (MoM) to reach 3.99 million barrels per day (bpd). Year-on-year (YoY), oil exports were down 35% during April, according to the Joint Organizations Data Initiative (JODI). Oil exports accounted for approximately 63% of the Kingdom's total output during April 2026, compared with 71% in the previous month. **(Argaam)**

Naseej Tech signs SAR 13.8M contract with UAE's NLA

Naseej for Technology Co. (Naseej Tech) signed today, June 24, a one-year contract to provide collection development and cataloging services for the UAE's National Library and Archives (NLA), at a total value of AED 13.54 million (SAR 13.83 million) inclusive of VAT. **(Argaam)**

GASCO completes acquisition of 50% stake in JACKO Gases

National Gas and Industrialization Holding Co. (GASCO) said it completed today, June 24, the regulatory procedures related to the acquisition of a 50% stake in JACKO Gases. Accordingly, the company has become the owner of 50% of the share capital of JACKO Gases, according to a statement to Tadawul. The financial impact of this transaction is expected to be reflected in GASCO's financial statements starting from Q3 2026. **(Argaam)**

Ladun signs framework agreement for Al Khalidiyah project in Makkah

Ladun Investment Co. signed a framework agreement with the Royal Commission for Makkah City and Holy Sites (RCMC) for the redevelopment of the informal Al Khalidiyah district in Makkah under the Developed Neighborhoods Program. **(Argaam)**

Masar Destination, Makkah Construction and Al Rajhi Real Estate Union sign framework agreements for Western and Southern Hindawiyah projects

The two sites have a combined area of 1.15 million square meters, including 841,300 square meters for Western Hindawiyah and 308,300 square meters for Southern Hindawiyah. The projects will be developed through a real estate investment fund managed by a company licensed by the Capital Market Authority. **(Argaam)**

Global

Japan's government blueprint nudges BOJ to fuel demand, clouding rates path

Japan's government will call for monetary policy that bolsters private demand, a draft of its long-term economic blueprint seen by Reuters showed, signalling a preference for keeping borrowing costs low and setting up potential policy tensions with the central bank. The draft urges the Bank of Japan (BOJ) to align its decisions with Prime Minister Sanae Takaichi's drive to reflate growth, citing legal provisions requiring the central bank to coordinate policy with the government. **(Reuters)**

US new single-family home sales post second straight monthly decline

Sales of new U.S. single-family homes unexpectedly fell in May, weighed down by higher mortgage rates and prices, dampening hopes for a housing recovery this year after prolonged weakness. **(Reuters)**

Commodities

Oil drops to lowest level since start of Iran war

Oil dropped on June 24, to its lowest level since late February as concerns eased over supply disruption via the Strait of Hormuz, coinciding with presidential directives in the US to investigate fuel pricing for consumers. Brent fell to $75.66 (-1.85%), while WTI declined to $71.88 (-1.80%) for August delivery. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics						
		23-Jun	24-Jun	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2286	2281	-0.2%	0.0%	2.3%
Value	mn	4006	4969	24.0%	-0.4%	-4.8%
Volume	mn	197	239	21.4%	3.6%	-5.7%
NOMU						
Market Cap	mn	7419	7438	0.2%	0.4%	-2.0%
Value	mn	17.9	15.3	-14.5%	-16.8%	-37.5%
Volume	mn	1.1	2.4	116.6%	-3.1%	-2.3%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MEYAR	30.22	2.72	10%
HAMAD SAEDAN REAL ESTATE	7.2	0.62	9%
NBM	41	2.3	6%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALDAWLIAH	5	-0.55	-10%
TIME	29.3	-2.62	-8%
DAR ALMARKABAH	1.23	-0.09	-7%

Source: Tadawul

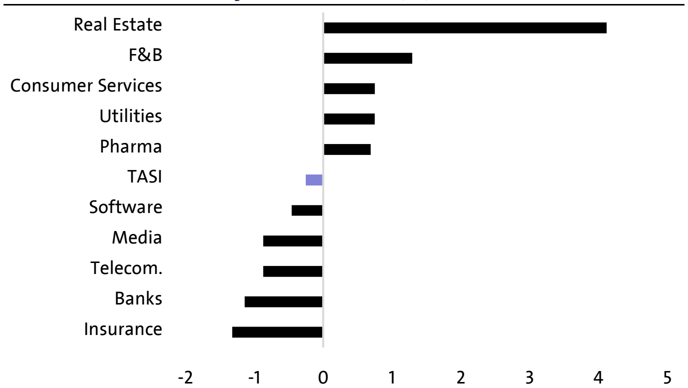
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
WAFRAH	21.78	1.98	10%
MASAR	18.48	1.68	10%
SFICO	59.75	5.4	10%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALRAJHI TAKAFUL	55.3	-2.55	-4%
CGS	6.74	-0.24	-3%
ALYAMAMAH STEEL	41	-1.36	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.09	0.05	2%	31.2
JABAL OMAR	15.2	0.56	4%	14.6
MASAR	18.48	1.68	10%	9.9
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	66	-0.95	-1%	593
JABAL OMAR	15.2	0.56	4%	225
SAUDI ARAMCO	26.34	-0.04	0%	216

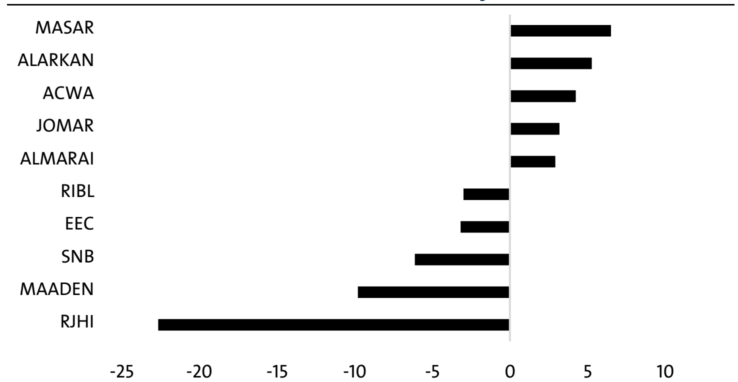
Source: Tadawul

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
25-Jun	ALBABTAIN FOOD	Ex-Dividend
28-Jun	TAWUNIYA	Ex-Dividend
28-Jun	MSGA	final allocation date
29-Jun	TAM DEVELOPMENT	Ex-Dividend
29-Jun	ALDAWLIAH	Ex-Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
02-Jul	U.S.	Initial Jobless Claims	Jun	225.00K	230.00K

Source: Bloomberg, Investing.Com

Contact Us:

Alinma Capital Company
Research Department (Sell-Side)
Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh 55560
Saudi Arabia
Phone: 011-2185555 =86309
E-mail: research@alinmacapital.com

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