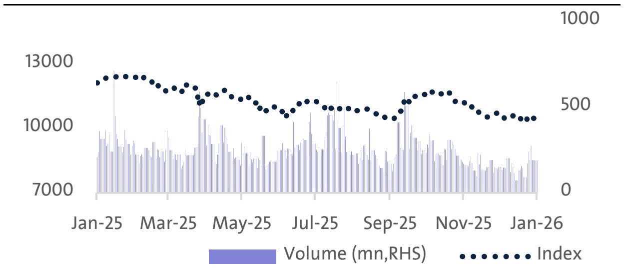
Daily Market Report

Key Indices-Return and Valuation

	26-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	10933	-0.7%	-0.7%	4%	14.2	1.6
NOMU	23009	-0.2%	0.2%	-2%	0.0	1.6
S&P500	7354	0.0%	-3.2%	7%	21.4	5.6
Dow Jones	51876	-0.1%	1.6%	8%	13.0	6.0
FTSE 100	10508	-0.2%	1.6%	6%	13.0	2.4
EuroStoxx50	6222	-0.7%	3.1%	7%	15.9	2.5
Nikkei225	69361	-4.2%	3.6%	38%	24.4	3.4
MSCI EM	1706	-2.8%	-3.8%	21%	12.9	2.6
SHCOMP	4027	-2.3%	-0.8%	1%	14.3	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
25-Jun	67	186	16	0.3:1

Money Market Yields

%	SAIBOR			Term SOFR		
	25-Jun	Δ bps	YTD Av	26-Jun	Δ bps	YTD Av
1M	4.63	-2.8	5.6	3.65	0.1	4.3
3M	4.77	4.6	5.4	3.74	0.0	4.3
6M	5.26	15.3	5.5	3.86	-0.5	4.2
12M	4.89	5.8	5.2	4.02	-2.0	4.0

Commodities

		26-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	81	0.7	135	60	-11.4
Brent	USDbbl	72	-4.3	118	59	-10.8
Gold	USDOz	4048	1.3	5502	3277	-18.8
Silver	USDOz	59	2.2	117	36	-36.0
Aluminum	USDton	3173	0.6	3851	2553	-13.6
Copper	USDton	13310	0.6	14140	9594	-15.3

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 updates anti-money laundering regulations

Saudi Arabia published updated executive regulations for the Anti-Money Laundering Law in the Official Gazette. The amendments, issued by the President of State Security, took effect on June 26, 2026. Under the updated rules, money laundering provisions apply to anyone who commits the original crime and participates in laundering its proceeds. **(Argaam)**

Jabal Omar plans to sell 400 hospitality units, develop Phase 7

Jabal Omar Development Co. announced strategic initiatives after the Jabal Omar project was included among the geographic areas where non-Saudis are allowed to own real estate. The company said in a Tadawul statement that it plans to offer 400 existing hospitality residential units for sale this year as a first phase. The proceeds will mainly be used to reduce debt. **(Argaam)**

SNB plans to redeem $1.25B AT1 sukuk

Saudi National Bank (SNB) announced its intention to redeem its $1.25 billion Additional Tier 1 (AT1) sukuk on July 26, 2026, in full, at face value plus any outstanding amount. The sukuk were issued on Jan. 26, 2021, for an aggregate value of $1.25 billion, the bank said in a statement to Tadawul. **(Argaam)**

SAL concludes deal with Singapore Airlines

SAL Saudi Logistics Services Co.'s Ground Handling Division signed, on June 25, a new strategic agreement with Singapore Airlines to provide comprehensive integrated solutions covering ground handling and air cargo. In a statement to Tadawul, the company said there is no set value. Services will be paid for on demand and in accordance with the prices specified in the agreement, noting that the deal is an annual renewable agreement. **(Argaam)**

MEFIC REIT says Plaza 1 usufruct contract expires in July

MEFIC REIT Fund said its board of directors approved on June 25 a decision not to renew the usufruct contract for the Plaza 1 property beyond its original term, set to expire in July 2026. The decision was made as the contract renewal is not deemed commercially viable, fund manager MEFIC Capital said in a statement to Tadawul. **(Argaam)**

Global

US consumer sentiment improves in June, concerns of high cost of living remain

U.S. consumer sentiment rebounded from record lows in June, though households remained worried about the high cost of living, a survey showed on Friday.The University of Michigan's Surveys of Consumers said its Consumer Sentiment Index increased to a final reading of 49.5 this month from 44.8 in May. It was a slight improvement from 48.9 earlier this month. **(Reuters)**

China industrial profits stay resilient as economy leans on factories, exports

Profits at China's industrial firms grew more slowly though still at a double-digit pace in May, highlighting a widening divide in an economy leaning on factory output and overseas shipments to counter soft domestic demand. **(Reuters)**

Commodities

Oil records 10% weekly drop; US WTI ends below $70

Oil prices pared gains at settlement on Friday as supply concerns eased and shipping through the Strait of Hormuz continued, despite an attack on a cargo vessel off the Omani coast a day earlier. Despite the incident, media reports said vessel traffic through the Strait of Hormuz continued in both directions. **(Argaam)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		24-Jun	25-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2281	2266	-0.7%	-0.7%	1.6%
Value	mn	4969	4199	-15.5%	-14.5%	-19.3%
Volume	mn	239	203	-15.2%	-10.9%	-19.8%
NOMU						
Market Cap	mn	7438	7423	-0.2%	0.2%	-2.2%
Value	mn	15.3	14.7	-3.9%	-19.1%	-39.7%
Volume	mn	2.4	2.0	-17.4%	-18.5%	-19.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NAF	4.34	0.92	27%
SPC	18.96	1.96	12%
NASEEJ TECH	24	2.38	11%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MARBLE DESIGN	6.42	-0.78	-11%
TIME	26.8	-2.5	-9%
RIYAL	13.13	-1.19	-8%

Source: Tadawul

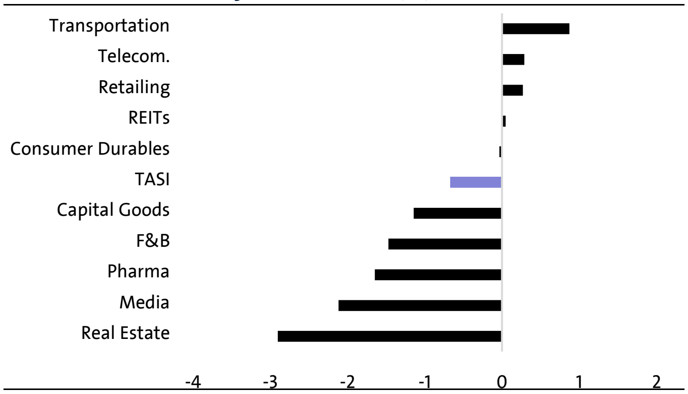
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	25.44	2.3	10%
SIPCHEM	14.7	0.67	5%
FIRST MILLS	54	2.25	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
DWF	95.2	-5.5	-5%
SARCO	46.52	-2.52	-5%
DAR ALARKAN	17.54	-0.94	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.07	-0.02	-1%	9.0
SIPCHEM	14.7	0.67	5%	9.0
BATIC	2.21	0.02	1%	9.0
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	66.35	0.35	1%	281
SAUDI ARAMCO	26.14	-0.2	-1%	232
MAADEN	60.1	-1.55	-3%	200

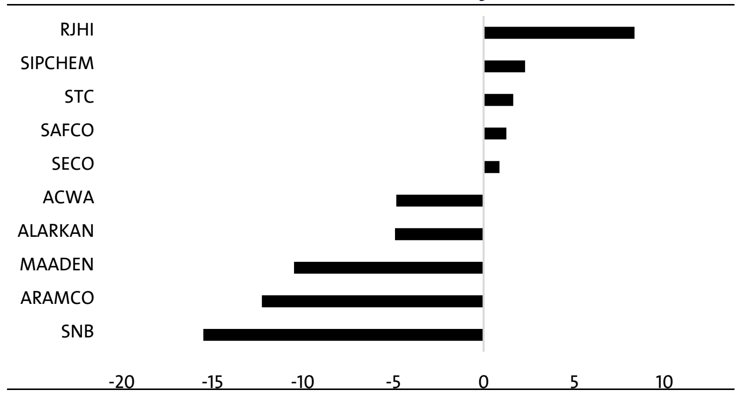
Source: Tadawul

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
28-Jun	TAWUNIYA	Ex-Dividend
28-Jun	MSGA	final allocation date
29-Jun	TAM DEVELOPMENT	Ex-Dividend
29-Jun	AME	Ex-Dividend
29-Jun	ALDAWLIAH	Ex-Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
02-Jul	U.S.	Average Hourly Earnings MoM	Jun	0.3%	0.2%

Source: Bloomberg, Investing.Com

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