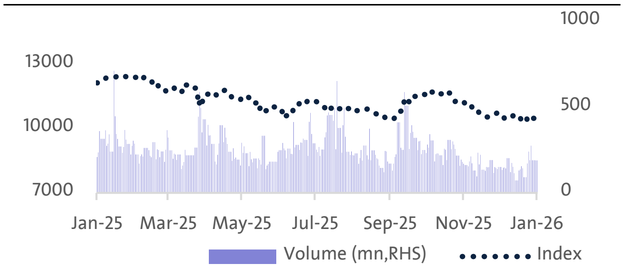
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	28-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	10908	-0.2%	-0.9%	3%	14.2	1.6
NOMU	23106	0.4%	0.6%	-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
28-Jun	92	165	13	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	28-Jun	Δ bps	YTD Av	26-Jun	Δ bps	YTD Av
1M	4.63	3.0	5.6	3.65	0.1	4.3
3M	4.77	10.7	5.4	3.74	0.0	4.3
6M	5.26	2.8	5.5	3.86	-0.5	4.2
12M	4.89	-1.3	5.2	4.02	-2.0	4.0

Commodities

		29-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	82	0.7	135	60	-11.5
Brent	USDbbl	72	0.3	118	59	-10.8
Gold	USDOz	4048	0.0	5502	3277	-18.9
Silver	USDOz	59	-0.6	117	36	-36.0
Aluminum	USDton	3173	0.0	3851	2553	-13.7
Copper	USDton	13310	0.0	14140	9594	-15.4

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

Masar to sell 2 land plots for SAR 462.1M

Umm Al Qura for Development and Construction Co. (Masar) sold two reserved land plots in Zone 1 of the Masar Destination project for a total of SAR 462.11 million to Madar Al-Tase'e Co., a special purpose vehicle (SPV) of a real estate fund managed by Alistithmar Capital. In a statement to Tadawul, the company said the fund will develop residential units on the two plots.. **(Argaam)**

Cenomi Centers inks SAR 1.33B contract for Al Khobar Downtown Mall, Boulevard

Arabian Centers Co. (Cenomi Centers) signed today, June 28, a design and build contract for the Al Khobar Downtown Mall and Boulevard project with Lynx Contracting Co., at a value of SAR 1.33 billion (excluding VAT). **(Argaam)**

MSGA IPO on Nomu 144.6% covered

MSGA Investment Co. completed the offering of 10% of its post-IPO issued capital at SAR 6 per share, said Yaqeen Capital Co., the financial advisor and lead manager of the share sale. The IPO was 144.59% oversubscribed, Yaqeen Capital said in a statement to Tadawul on Sunday. **(Argaam)**

MAWANI launches new Yanbu container service in partnership with SABIC

Saudi Ports Authority (MAWANI) launched the Red Sea Express container service at King Fahad Industrial Port in Yanbu in partnership with Folk Maritime, SABIC, and Red Sea Gateway Terminal (RSGT). The port welcomed the Saudi-flagged vessel Folk Jubail as the first ship to operate on the new service, carrying the port's inaugural container shipment with a capacity of 1,100 TEUs. **(Argaam)**

Nofoth signs MoU to acquire 70% stake in Al Waal Al Bari Beverages

Nofoth Food Products Co. signed a non-binding memorandum of understanding (MoU) on June 28 with several shareholders of Al Waal Al Bari Beverages Co. (a limited liability company).The MoU aims to explore the potential acquisition of a 70% stake in the company. **(Argaam)**

SRMG's Taoq PR signs SAR 200M media services contract

Saudi Research and Media Group (SRMG) said its subsidiary Taoq Public Relations Co. (Taoq PR) signed on June 28 a contract with a commercial company active in publicity, advertising, and public relations to provide operational services in the media and marketing segments. The contract has an annual value of SAR 200 million, according to a statement to Tadawul. **(Argaam)**

Global

China debuts overnight reverse repos at 1.25%, sources say

China's central bank launched overnight reverse repo operations on Monday, a move markets interpreted as deepening its control over liquidity conditions and aligning its policy framework more closely with global peers. The People's Bank of China (PBOC) said it conducted overnight reverse repos in open market operations for the first time, offering 300 billion yuan ($44.10 billion) to financial institutions, according to an online statement. **(Reuters)**

Commodities

Oil climbs following renewed US, Iran strikes in Middle East

Oil prices rose on Monday following days of tit-for-tat strikes by the U.S. and Iran that underscored the fragility of their interim peace deal and again slowed energy shipping through the Strait of Hormuz. Brent crude futures climbed 58 cents, or 0.8%, to $72.57 a barrel at 0207 GMT while U.S. West Texas Intermediate crude was at $70.11 a barrel, up 88 cents, or 1.3%. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics						
		25-Jun	28-Jun	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2266	2260	-0.2%	-0.9%	1.4%
Value	mn	4199	4199	0.0%	-13.9%	-19.2%
Volume	mn	203	143	-29.3%	-35.0%	-43.0%
NOMU						
Market Cap	mn	7423	7454	0.4%	0.6%	-1.8%
Value	mn	14.7	0.0	-100.0%	-100.0%	-100.0%
Volume	mn	2.0	2.0	-0.1%	-17.8%	-19.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
RAWASI	4.18	0.38	10%
NBM	45.02	4.02	10%
EDARAT	299	21	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALMUNEEF	7.14	-0.79	-10%
NASEEJ TECH	22	-2	-8%
MULTI BUSINESS	2.55	-0.22	-8%

Source: Tadawul

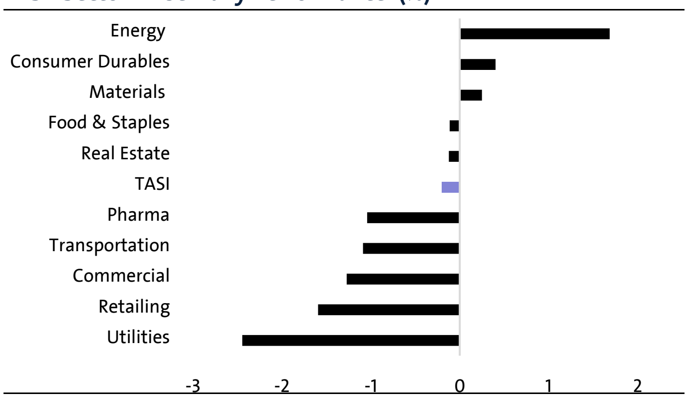
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MUTAKAMELA	9.95	0.9	10%
SFICO	65.35	5.9	10%
SALAMA	8.99	0.81	10%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALMAWARID	100.9	-4.2	-4%
ARABIAN MILLS	47.42	-1.76	-4%
ACWA	192.6	-5.9	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BAAN	2.19	0.09	4%	15.0
BATIC	2.2	-0.01	0%	8.5
AMERICANA	2.05	-0.02	-1%	6.2
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.6	0.46	2%	148
ALRAJHI	66.3	-0.05	0%	132
SNB	39.5	-0.48	-1%	81

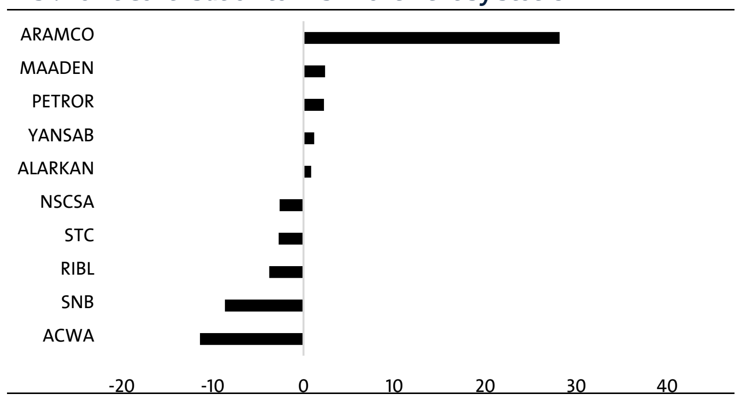
Source: Tadawul

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
29-Jun	TAM DEVELOPMENT	Ex-Dividend
29-Jun	AME	Ex-Dividend
29-Jun	ALDAWLIAH	Ex-Dividend
30-Jun	SAMA	Report
30-Jun	BUPA ARABIA	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

Daily Market Report

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