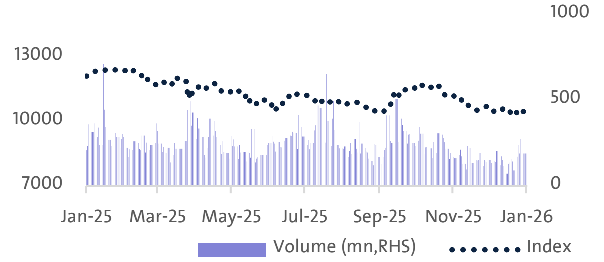
الإنمـاء الماليـة
alinma capital

Daily Market Report

Key Indices-Return and Valuation

	29-Jun*	DoD	MTD	YTD	P/E	P/BV
TASI	10792	-1.3%	-2.0%	2%	14.0	1.6
NOMU	23069	0.3%	0.5%	-2%	0.0	1.6
S&P500	7440	1.2%	-2.1%	9%	21.6	5.6
Dow Jones	52183	0.6%	2.2%	9%	12.9	6.0
FTSE 100	10484	-0.2%	1.4%	6%	12.9	2.4
EuroStoxx50	6232	0.2%	3.3%	8%	15.9	2.5
Nikkei225	69468	0.2%	3.8%	38%	24.3	3.2
MSCI EM	1707	0.0%	-3.7%	21%	12.6	2.5
SHCOMP	4074	1.2%	0.4%	3%	14.5	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
29-Jun	110	148	12	0.7:1

Money Market Yields

%	SAIBOR			Term SOFR		
	29-Jun	Δ bps	YTD Av	27-Jun	Δ bps	YTD Av
1M	4.65	2.2	5.6	3.64	-0.9	4.3
3M	4.73	-4.2	5.4	3.73	-1.2	4.3
6M	5.10	-15.7	5.5	3.85	-1.9	4.2
12M	4.92	2.4	5.2	3.99	-2.8	4.0

Commodities

		29-Jun	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	83	2.4	135	60	-11.5
Brent	USDbbl	73	1.6	118	59	-10.8
Gold	USDOz	4043	-0.1	5502	3277	-18.9
Silver	USDOz	58	-1.5	117	36	-36.0
Aluminum	USDton	3084	-2.8	3851	2553	-13.7
Copper	USDton	13330	0.2	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

Saudi unemployment rate falls to 6.4% in Q1 2026

Saudi Arabia's unemployment rate among Saudi nationals fell to 6.4% in the first quarter of 2026, down from 7.2% in Q4 2025, according to the General Authority for Statistics (GASTAT). The unemployment rate stood at 4.9% for Saudi males and 9% for Saudi females, while the rate for non-Saudis was 1.5%. **(Argaam)**

Saudi Arabia's chemical exports down 26% to SAR 4.61B in April

Saudi Arabia's exports of chemical and related products fell by 26% year-on-year (YoY) to nearly SAR 4.61 billion in April 2026. The value of the Kingdom's chemical exports during April reached its lowest since 2020, due to the geopolitical crisis caused by the US-Iran war that led to the closure of the Strait of Hormuz. **(Argaam)**

Every SAR 100 in tourism spending generates SAR 60 in direct GDP contribution: Tourism Ministry Official

Hassan Jannah, Saudi Arabia's Deputy Minister of Tourism for Data and Decision Support, said every SAR 100 in total tourism spending generates SAR 60 in direct contribution to the Kingdom's gross domestic product (GDP), in addition to another SAR 100 in indirect GDP contribution. **(Argaam)**

Bank AlJazira redeems entire $500M Tier 1 sukuk

Bank AlJazira announced it fully redeemed its $500 million Tier 1 sukuk at nominal value, representing 100% of the issue price, on June 29, 2026. The sukuk were issued on June 29, 2021, with a total value of $500 million. **(Argaam)**

Al Jouf Cement signs SAR 55.4M contract for cement, clinker export to Syria

Al-Jouf Cement Co. said it signed a one-year sale-and-supply contract with Maham Construction & Contracting Co., a subsidiary of Al-Hassan Holding Group, for the export of various types of cement and clinker to Syria. The contract is valued at SAR 55.41 million, the company said in a statement to Tadawul. **(Argaam)**

Global

UK economy grew by 0.6% at the start of 2026, ONS confirms

Britain's economy grew by 0.6% in the January-to-March period, as expected, figures from the Office for National Statistics showed on Tuesday. Economists polled by Reuters had forecast the reading for gross domestic product to be unrevised from a provisional estimate of 0.6% growth which was published by the ONS last month. **(Reuters)**

China factory activity returns to expansion riding AI global boom

China's factory activity returned to expansion in June, driven by demand for chips, computers and other AI-related products, as robust export orders and front-loading to the United States to get ahead of tariffs offset weakness elsewhere in the economy. **(Reuters)**

Commodities

Oil falls as investors focus on potential Iran-US talks in Doha

Oil prices dipped on Tuesday and were poised for a monthly decline, with investors eyeing potential U.S.-Iran talks in Doha amid a strained interim ceasefire in the four-month-old war. Brent August crude futures , which expire on Tuesday, were down 0.9%, or 64 cents, at $72.51 a barrel as of 0356 GMT. These levels are around $20, or 22%, lower than last month's closing. The more actively traded September contract was down 0.4%, or 31 cents, at $73.6 a barrel. **(Reuters)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		28-Jun	29-Jun	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2266	2236	-1.3%	-2.0%	0.3%
Value	mn	4199	4380	4.3%	-8.5%	-15.4%
Volume	mn	203	235	16.1%	4.3%	-6.6%
NOMU						
Market Cap	mn	7423	7442	0.3%	0.5%	-1.9%
Value	mn	14.7	16.2	9.7%	-10.5%	-33.5%
Volume	mn	2.0	2.5	23.0%	0.3%	-0.3%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
HAMAD BIN SAEDAN REAL ESTATE	8.37	0.76	10%
DRC	28	2.34	9%
ALBABTAIN FOOD	23.88	1.87	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
KEIR	2.77	-1.18	-30%
SPC	17.1	-1.86	-10%
MULTI BUSINESS	2.31	-0.24	-9%

Source: Tadawul

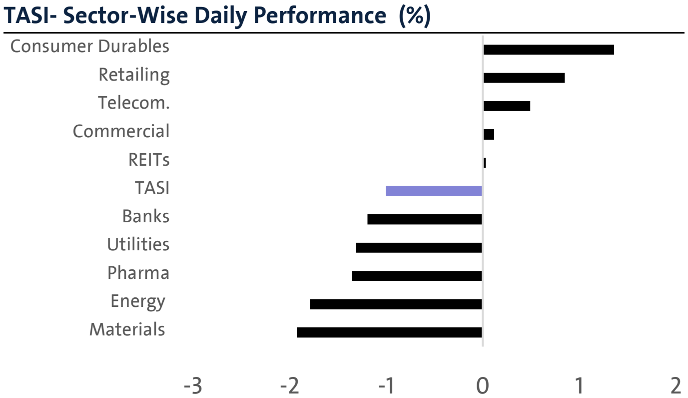
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	29.48	2.68	10%
SVCP	18.93	1.72	10%
SARCO	51.05	4.63	10%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
BAAN	2.03	-0.16	-7%
PETRO RABIGH	12.14	-0.6	-5%
RIYADH CABLES	119	-5.6	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI DARB	2.22	0.1	5%	22.0
BAAN	2.03	-0.16	-7%	18.7
BATIC	2.25	0.05	2%	11.5
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	65.8	-0.5	-1%	316
SAUDI ARAMCO	26.1	-0.5	-2%	301
SNB	38.6	-1.0	-2%	182

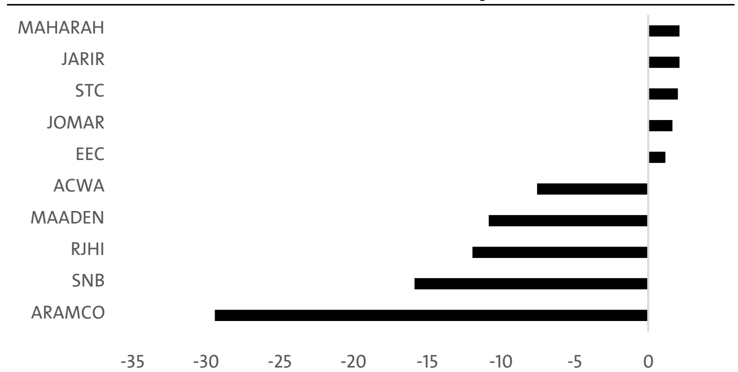
Source: Tadawul

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
30-Jun	SAMA	Report
30-Jun	BUPA ARABIA	Ex-Dividend
30-Jun	FAKEEH CARE	Ex-Dividend
30-Jun	ZAIN KSA	Ex-Dividend
30-Jun	General Authority For Statistics	Labor market statistics report- Q126

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

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

Disclaimer

Banking division of Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document maybe in the process of soliciting or executing fee earning mandates for companies that is either the subject of this document or is mentioned in this document. One or more of Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document board members or executive managers could be also a board member or member of the executive management at the company or companies mentioned in this report, or their associated companies. No part of this report may be reproduced whether inside or outside the Kingdom of Saudi Arabia without the written permission by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document.
Alinma Capital, a Saudi closed joint stock company under CR No. 1010269764 and the Capital Market Authority License No.37-09134.