

# Daily Market Report

2026-06-18

## Market Commentary & News

- ▶ **KSA Market Performance:** The TASI index slipped 0.3% on Wednesday, with the majority of sectors closing lower. The banking sector edged down 0.5%, weighed down by losses in Bank Albilad (-0.8%) and SNB (-0.7%). Elsewhere, the media & entertainment sector was the worst performer, falling 1.7%, with Al Arabia and SRMG declining 2.4% and 1.6%, respectively. In contrast, the software & services sector surged 2.4%, driven by a 3.4% gain in Elm and a 1.9% rise in MIS.
- ▶ **Today's clues:** US markets declined on Wednesday after the US Fed signaled that interest rates could rise during the remainder of 2026. Asian markets, however, are trading mixed this morning. Crude oil prices remained under pressure as the IEA forecast an oil supply glut in 2027 expecting a lasting resolution to the Middle East conflict.

### News

- ▶ Al-Khaleej Training extended its non-binding MoU with GFH Bank, related to merging educational assets and establishing a new entity, by 180 days from 18 June 2026 (Tadawul).
- ▶ Morabaha Marina posted SAR3.5mn net loss in 1Q26 vs. SAR4.2mn net profit in 1Q25. Revenue fell 11.6% y/y in the same period (Tadawul).
- ▶ Leejam Sports launched two new fitness centers in Unaizah City, with the financial impact expected from 2Q26 (Tadawul).
- ▶ Jabal Omar signed 15-years, SAR2bn Murabaha facility agreement with SNB to refinance existing facilities (Tadawul).
- ▶ KEC secured a 1 year, SAR150mn Shariah-compliant financing facility from Riyadh Bank to finance construction of cluster 1 and 2 and phase 1 of IWD (Tadawul).
- ▶ Rawasi Albina Investment secured a project worth SAR54.0mn from Saudi Energy Company (Tadawul).
- ▶ MoF extended three framework agreements of Sign World by one year each. Cumulative value of the three contracts is SAR213.5mn (Argaam).
- ▶ Al Rashid Industrial's shareholders approved increasing share capital by 50% through 1:2 bonus shares issuance (Tadawul).
- ▶ STC extended its MoU with HUMAIN by 6 months regarding the establishment of a JV through its subsidiary, Digital Centers for Data & Telecommunications Company (Tadawul).
- ▶ SMC Healthcare's 51% subsidiary secured a SAR3.8bn project from the Ministry of Health to manage & operate SABIC Behavioral Care Specialist Hospital (Tadawul).
- ▶ Anmat Technology received a project from the Ministry of Defense worth SAR37.0mn (Tadawul).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,115	-0.3%	6.0%	4.9%
Div Yield* (%)	4.1%		Turnover (SAR bn)	4.24
PE* (Fwd)	14.5x		Adv/Decline	72 / 182
PE (12m Trailing)	17.3x		50DMA	11,150
PB	2.2x		100DMA	11,096
M.Cap (SAR bn)	9,661		200DMA	11,024

Global Markets	Last close	1D%	YTD%	P/E*
SPX	7,420	-1.2%	8%	21.8x
Nasdaq	26,022	-1.3%	12%	28.9x
FTSE 100	10,509	0.1%	6%	13.2x
DAX	24,935	0.1%	2%	16.1x
Shanghai	4,098	-0.2%	3%	14.6x
Nikkei	71,184	1.8%	41%	24.5x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	77.7	-2.3%	28%	1%
WTI (US\$/b)	74.8	-2.6%	31%	13%
NG (US\$/mmbtu)	3.1	-0.6%	-15%	-22%
Gold (US\$/t)	4,301	1.0%	0%	28%
Copper (US\$/t)	13,815	0.3%	11%	43%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	100.3	0.2%	2%	1%
CNY/USD	6.8	0.0%	3%	6%
USD/EUR	1.15	0.1%	-2%	0%
USD/GBP	1.33	0.1%	-1%	-1%
Bitcoin (US\$)	63,845	-0.8%	-27%	-39%

Rates	Spot	% chg
SOFR (%) - Overnight	3.63	0.0
SAIBOR (%) - 3M	4.69	-2.2
SAIBOR (%) - 6M	5.09	-0.5
SAIBOR (%) - 12M	4.86	-0.2
US 2Y Govt bond (%)	4.16	-0.5
US 10Y Govt bond (%)	4.45	-0.7
Saudi 10Y Govt Bond (%)	4.88	0.1

Source: Bloomberg, \*1 year forward Bloomberg consensus

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## Index Movers

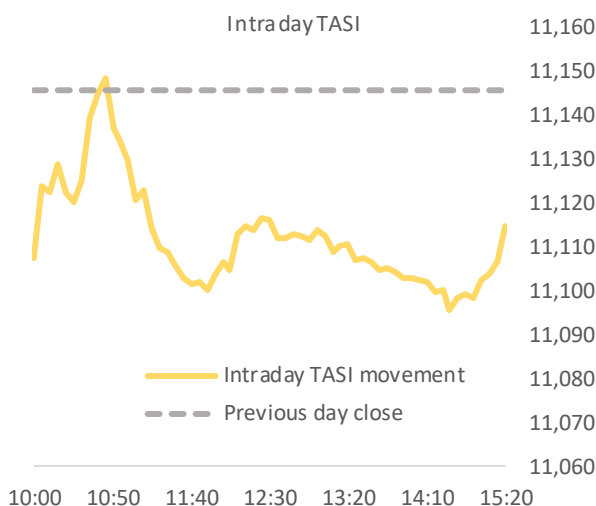
Up	1D%	Down	1D%
Maaden	1.2%	Aramco	-0.6%
Acwa Power	1.0%	Al Rajhi	-0.4%
STC	0.9%	SNB	-0.7%
Elm	3.4%	SABIC	-1.2%
Jarir	1.3%	Bupa	-2.5%

Top Gainers	Last Price	1D%
GIG	31.68	6.2%
Elm	737.00	3.4%
East Pipes	220.00	3.1%
Build Station	46.48	2.7%
FIPCO	31.36	2.5%

Top Losers	Last Price	1D%
AlJazira Tak.	11.52	-5.0%
Saudi Cement	31.38	-4.3%
Petro Rabigh	12.70	-4.2%
UCA	3.29	-3.8%
Equipment House	30.32	-3.3%

Most active by Vol	Last Price	Vol
Americana	2.04	15.84MLN
Aramco	26.60	9.91MLN
Petro Rabigh	12.70	6.16MLN
DBS	13.14	5.33MLN
Jarir	16.81	5.05MLN

Most active by Val	Last Price	Val (SAR mn)
Al Rajhi	67.20	276
Aramco	26.60	263
Acwa Power	202.50	161
STC	44.80	158
Maaden	62.85	156



Sectorial Performance	Index mover*	1D%
TASI		-0.3%
Banks	-57.0%	-0.5%
Materials	-2.1%	0.0%
Energy	-36.4%	-0.6%
Telecom	10.0%	0.5%
Food & Bev.	-4.4%	-0.4%
Media	-2.8%	-1.7%
Healthcare	-2.9%	-0.2%
Capital Goods	-2.1%	-0.2%
Consumer Staples Retail	-0.8%	-0.3%
Consumer Services	-2.7%	-0.6%
Transport	2.3%	0.5%
Software	11.2%	2.4%
Commercial	-0.6%	-0.3%
Consumer Durables	-0.3%	-0.5%
Utilities	12.5%	0.7%
Insurance	-9.4%	-0.9%
Real Estate	-11.8%	-0.7%
Pharma	0.8%	0.6%
REITs	-0.5%	-0.2%
Retailing	0.8%	0.1%
Diversified Financials	-1.6%	-0.6%

Source: Bloomberg; \*indicates the impact on index

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