

Daily Market Report

2026-04-15

Market Commentary & News

► **KSA Market Performance:** The TASI index gained 0.5% on Tuesday, with almost all sectors ending in green. The banking sector rose 0.4%, supported by Al Rajhi (+0.6%) and BSF (+1.1%), while the energy sector gained 0.8%, due to 2.6% uptick in Arabian Drilling. Similarly, Naseej posted 9.9% gains while Elm and Azm rose 7.0% and 5.7%, respectively. Conversely, YC declined the most by 4.6%, Petro Rabigh fell 2.3%, and Tasheel lost 1.3%.

► **Today's clues:** US markets further increased on the expectation of a potential peace deal in the Middle East. Asian Markets are also trading higher following the US markets. Oil prices declined on rising optimism over a peace deal in the Middle East, easing geopolitical tension.

News

- Al Akaria signed a SAR50.1mn facilities management contract for 12 months with Mumtalakat for properties (Tadawul).
- UCIC board announced a cash dividend of SAR0.5/sh for 4Q25, resulting in an annual yield of 6.1% (Tadawul).
- Burgerizzr's board recommended a cash dividend of SAR0.1/sh for 2025, yielding 1.3% annually (Tadawul).
- Ladun inked a MoU with Asbar Capital for 6 months to develop a mixed-use project in Riyadh (Tadawul).
- Edarat and IT Co. secured a framework contract from Saudi Energy for data center design, supervision, and commissioning services, with value based on future work orders (Tadawul).
- SPC secured a SAR30.0mn Sharia-compliant credit facility from SAIB, valid till November 2026 (Tadawul).
- Future Vision updated its capital increase plan to fully capitalize SAR10.0mn from the share premium account instead of retained earnings/proceeds (Tadawul).
- Tasnee delayed completion of maintenance and expansion at its ethylene and polyethylene JV plant due to global supply chain disruptions (Tadawul).
- GAS subsidiary GMT signed a 5-year contract with OGS for oil and gas systems, with project-based revenue (Tadawul).
- Naseej tech secured an AED22.7mn contract with e& Enterprise for 3 years to provide maintenance and operational services for the Mohammed Bin Rashid Library (Tadawul).
- Al Habib group plans to expand its medical center network across Riyadh and Dubai in next two years (Argaam).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,486	0.5%	9.5%	-1.1%
Div Yield* (%)	3.9%	Turnover (SAR bn)	6.19	
PE* (Fwd)	15.8x	Adv/Decline	218 / 42	
PE (12m Trailing)	18.4x	50DMA	11,096	
PB	2.3x	100DMA	10,888	
M.Cap (SAR bn)	9,944	200DMA	10,999	

Global Markets	Last close	1D%	YTD%	P/E*
SPX	6,967	1.2%	2%	21.4x
Nasdaq	23,639	2.0%	2%	26.0x
FTSE 100	10,609	0.2%	7%	13.6x
DAX	24,044	1.3%	-2%	15.8x
Shanghai	4,034	0.2%	2%	16.8x
Nikkei	58,157	0.5%	16%	23.2x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	95.3	0.5%	57%	47%
WTI (US\$/b)	91.1	-0.2%	60%	55%
NG (US\$/mmbtu)	2.6	0.0%	-29%	-22%
Gold (US\$/t)	4,818	-0.5%	12%	49%
Copper (US\$/t)	13,285	1.8%	7%	45%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	98.1	0.0%	0%	-2%
CNY/USD	6.8	0.0%	2%	7%
USD/EUR	1.18	0.0%	0%	5%
USD/GBP	1.36	0.0%	1%	3%
Bitcoin (US\$)	74,006	-0.2%	-16%	-12%

Rates	Spot	% chg
SOFR (%) - Overnight	3.63	0.0
SAIBOR (%) - 3M	4.77	-0.9
SAIBOR (%) - 6M	5.25	-0.1
SAIBOR (%) - 12M	4.69	-0.4
US 2Y Govt bond (%)	3.74	-0.1
US 10Y Govt bond (%)	4.24	-0.1
Saudi 10Y Govt Bond (%)	4.77	0.0

Source: Bloomberg, *1 year forward Bloomberg consensus

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Index Movers

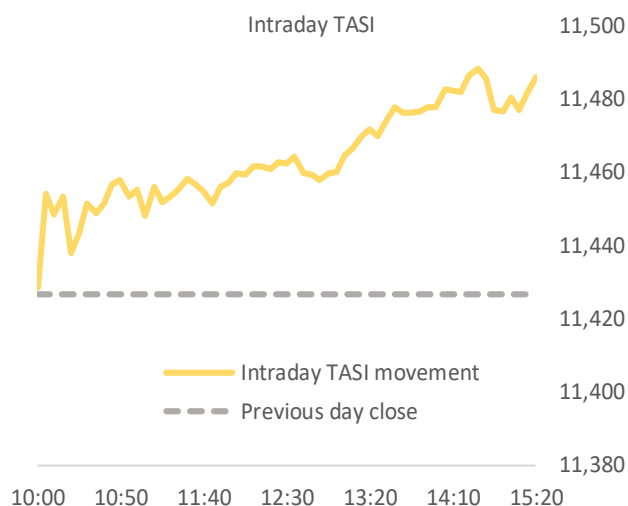
Up	1D%	Down	1D%
Acwa Power	3.3%	Aramco	-0.9%
Al Rajhi	0.6%	Yamama Cemen	-4.6%
SABIC	2.0%	SAB	-0.4%
Elm	7.0%	PetroRabigh	-2.3%
Riyadh Cables	4.3%	Taiba	-1.2%

Top Gainers	Last Price	1D%
Naseej	26.14	9.9%
Abo Moati	44.50	8.5%
Elm	585.50	7.0%
MESC	31.00	6.2%
APC	6.66	6.2%

Top Losers	Last Price	1D%
Yamama Cement	24.23	-4.6%
PetroRabigh	10.64	-2.3%
Alahli REIT	6.45	-2.1%
SMC healthcare	18.84	-1.9%
SaudiRe	26.14	-1.6%

Most active by Vol	Last Price	Vol
APC	6.66	19.85MLN
Americana	1.88	18.13MLN
Aramco	27.36	15.11MLN
BATIC	2.23	9.70MLN
SNB	44.00	9.26MLN

Most active by Val	Last Price	Val (SAR mn)
Aramco	27.36	414
SNB	44.00	407
Al Rajhi	108.20	337
Elm	585.50	308
Alinma	29.94	167



Sectorial Performance	Index mover*	1D%
TASI		0.5%
Banks	26.7%	0.4%
Materials	20.0%	0.8%
Energy	-26.9%	-0.8%
Telecom	0.3%	0.0%
Food & Bev.	6.7%	1.2%
Media	2.9%	3.3%
Healthcare	4.6%	0.6%
Capital Goods	7.4%	1.5%
Consumer Staples Retail	1.5%	1.0%
Consumer Services	3.8%	1.7%
Transport	3.8%	1.7%
Software	8.8%	4.3%
Commercial	0.8%	1.0%
Consumer Durables	0.5%	2.0%
Utilities	19.6%	2.4%
Insurance	6.9%	1.4%
Real Estate	4.6%	0.6%
Pharma	1.8%	2.6%
REITs	0.5%	0.5%
Retailing	2.8%	0.8%
Diversified Financials	1.6%	1.2%

Source: Bloomberg; *indicates the impact on index movement

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Contact us for queries:

Sell Side Research Department,
GIB Capital,
B1, Granada Business & Residential Park,
Eastern Ring Road, P.O. Box 89589, Riyadh 11692