Daily Market Report

2026-07-05

Market Commentary & News

- **KSA Market Performance:** The TASI index declined 0.3% on Thursday, with most sectors closing in negative territory. The Capital Goods sector was the worst performer, falling 2.1%, weighed down by losses in EIC (-4.5%), Bawan (-3.0%), and Riyadh Cables (-1.9%). Among individual stocks, Tasheel and Jamjoom Pharma retreated 3.6% and 3.5%, respectively. On the upside, the Banking sector edged up 0.1%, supported by BSF (+1.1%). Meanwhile, Sharqiyah Development hit the upper circuit, and Jazira Takaful surged more than 9%.
- **Today's clues:** US markets remained closed on Friday in observance of Independence Day. In the preceding session, markets closed mixed, with the Dow Jones ending higher after a softer-than-expected jobs report for June fueled hopes of Fed rate cuts. Consequently, Asian markets closed higher across the board on Friday. Meanwhile, crude oil prices remained broadly stable, with traders closely monitoring US-Iran talks.

News

- Almarai's 2Q26 net profit fell by 1.7% y/y while the topline rose by 11% over the same period (Tadawul).
- CATRION signed a 15-year lease with Dammam Airport Co. for premises at Dammam Airport, valued at SAR75.7mn, plus a 3.5%–5.5% annual revenue-sharing component (Tadawul).
- Alandalus Property's subsidiary acquired land in Riyadh's Al Naseem for SAR23.7mn to develop an educational complex as part of diversification strategy (Tadawul).
- Alandalus Property secured an 8-year Shariah-compliant Tawarruq financing from SAB valued at SAR48mn, to support its 2026–30 strategy (Tadawul).
- Tam Development signed a 3-year framework agreement with Saudi Council of Engineers to provide operational support and services, with an estimated value of SAR70mn (Tadawul).
- Banan Real Estate signed a two-year contract worth SAR54.9mn, to develop and market a hotel project in Al Rahmaniyah for Artal Fourth Real Estate Fund, with financial impact expected from 2H26 (Tadawul).
- Purity for IT Co. secured a 3-year contract worth SAR9.3mn with Emirate of Al-Qassim for O&M of Cyber support (Tadawul).
- Shalfaa Facilities Management Co. along with Shalfaa International won a contract worth SAR36mn from ZATCA to provide security guard services across KSA (Tadawul).
- OPEC's output rose by 2.34mn bpd to 18.75mn bpd in June after exports through the Strait of Hormuz resumed, though production remained 28% below pre-conflict levels (Argaam).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	10,827	-0.3%	3.2%	-3.7%
Div Yield* (%)	4.2%	Turnover (SAR bn)		4.33
PE* (Fwd)	14.1x	Adv/Decline		96 / 153
PE (12m Trailing)	16.9x	50DMA		11,060
PB	2.1x	100DMA		11,081
M.Cap (SAR bn)	9,438	200DMA		11,039

Global Markets	Last close	1D%	YTD%	P/E*
SPX	7,483	0.0%	9%	21.9x
Nasdaq	25,833	-0.8%	11%	28.8x
FTSE 100	10,679	0.2%	8%	13.3x
DAX	25,779	0.8%	5%	16.8x
Shanghai	4,044	0.4%	2%	14.3x
Nikkei	69,744	1.5%	39%	24.3x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US$/b)	72.1	0.4%	19%	5%
WTI (US$/b)	68.8	0.1%	21%	11%
NG (US$/mmbtu)	3.2	1.5%	-12%	-5%
Gold (US$/t)	4,177	1.3%	-3%	26%
Copper (US$/t)	13,367	0.3%	8%	34%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	100.9	0.0%	3%	4%
CNY/USD	6.8	0.1%	3%	6%
USD/EUR	1.14	0.0%	-3%	-3%
USD/GBP	1.34	0.0%	-1%	-2%
Bitcoin (US$)	62,666	-0.8%	-29%	-42%

Rates	Spot	% chg
SOFR (%) - Overnight	3.66	0.0
SAIBOR (%) - 3M	4.83	1.7
SAIBOR (%) - 6M	5.21	2.1
SAIBOR (%) - 12M	4.93	0.0
US 2Y Govt bond (%)	4.14	0.0
US 10Y Govt bond (%)	4.48	0.0
Saudi 10Y Govt Bond (%)	5.00	0.0

*Source: Bloomberg, *1 year forward Bloomberg consensus*

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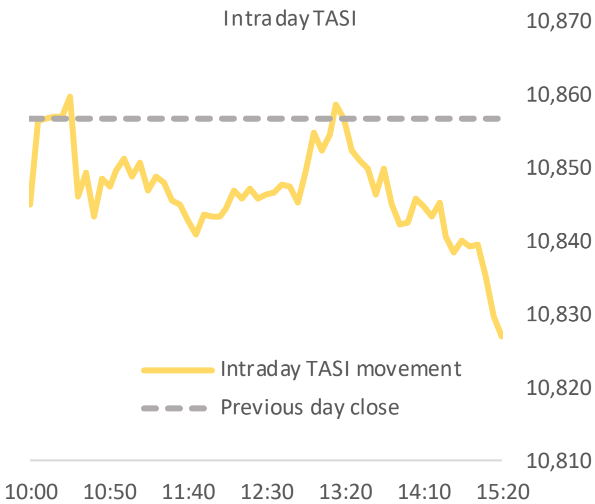
Index Movers

Up	1D%	Down	1D%
AlMarai	2.1%	Acwa Power	-1.4%
Jarir	2.8%	Maaden	-1.3%
BSF	1.1%	EIC	-4.5%
Alinma	0.5%	SABIC	-1.3%
SAB	0.5%	STC	-0.7%



Top Gainers	Last Price	1D%
Sharqiyah	15.86	10.0%
AlJazira Tak.	13.09	9.5%
LIVA	13.96	7.5%
Thimar	41.50	6.4%
SARCO	54.55	5.7%

Top Losers	Last Price	1D%
Saleh Al Rashed	40.94	-4.5%
EIC	14.82	-4.5%
CMCER	6.00	-4.3%
Enaya	11.17	-3.7%
Tasheel	34.40	-3.6%

Most active by Vol	Last Price	Vol
Saudi Darb	2.34	24.78MLN
Americana	2.09	14.90MLN
BATIC	2.23	11.91MLN
BAAN	2.16	10.99MLN
SIECO	2.42	7.89MLN

Most active by Val	Last Price	Val (SAR mn)
Rasan	148.00	303
Al Rajhi	66.00	221
Aramco	26.10	192
SNB	38.96	128
Saudi Fish.	77.60	127

Sectorial Performance	Index mover*	1D%
TASI		-0.3%
Banks	13.4%	0.1%
Materials	-39.7%	-0.9%
Energy	-4.4%	-0.1%
Telecom	-7.3%	-0.3%
Food & Bev.	12.2%	1.1%
Media	-1.1%	-0.7%
Healthcare	-7.7%	-0.6%
Capital Goods	-19.2%	-2.1%
Consumer Staples Retail	0.2%	0.1%
Consumer Services	-2.4%	-0.5%
Transport	-1.9%	-0.4%
Software	-3.5%	-0.7%
Commercial	-2.2%	-1.1%
Consumer Durables	0.0%	-0.1%
Utilities	-20.6%	-1.1%
Insurance	-9.6%	-1.0%
Real Estate	-11.2%	-0.7%
Pharma	-2.2%	-1.6%
REITs	-0.4%	-0.2%
Retailing	7.8%	1.1%
Diversified Financials	-1.4%	-0.5%

*Source: Bloomberg; *indicates the impact on index*

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Disclaimer

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