

Daily Market Report

2026-04-21

Market Commentary & News

► **KSA Market Performance:** The TASI index declined 0.9% on Monday, with almost all sectors ending in red. The banking sector declined 0.9%, weighed down by Al Rajhi (-1.2%), ANB (-1.5%), and Alinma (-0.9%). The materials sector also fell 1.4% due to 2.1% decline in Maaden and 1.9% reduction in SABIC. Individually, Saudi Cable (-4.5%) and Miahona (-4.3%) were among the top losers. On the other hand, Jarir gained the most by 3.3%, Cherry rose 3.1%, and Rasan increased 1.6%.

► **Today's clues:** US markets ended lower on Monday as rising tensions in the Middle East weighed on investor sentiment. Asian markets are trading mixed with cautious optimism over the ceasefire deal. Oil prices remained largely stable as investors assessed the uncertainty over the peace talks.

News

- SNB's net profit rose 6.7% y/y to SAR6.4bn in 1Q26, while financing income grew 4.4% in the same period (Tadawul).
- Al Rajhi posted 5.1% y/y growth in net profit during 1Q26, while financing income surged 12.2% y/y (Tadawul).
- ANB's net profit rose 4.2% y/y to SAR1.4bn in 1Q26, while financing income grew 6.9% y/y (Tadawul).
- Aldrees net profit rose 8.9% y/y in 1Q26, while revenue increased 17.2% in the same period (Tadawul).
- Solutions signed a SAR132.4mn contract with STC for 3 years to modernize cloud data center infrastructure (Tadawul).
- Anaam Holding withdrew its SAR105.0mn rights issue application to current market conditions (Tadawul).
- SHL Finance's board recommended a cash dividend of SAR0.50/sh for 2025, yielding 3.3% annually (Tadawul).
- Al Rasheed extended its non-binding MoU with Taif Shipping by 90 days to complete investment evaluations (Tadawul).
- Twareat secured a SAR38.8mn contract with Johns Hopkins Aramco Healthcare for 3 years to provide workforce support services (Tadawul).
- CGS secured an EUR6.8mn contract under S2 project for Management and Development of Lands and Real Estate for a freezer facility project in Kuwait (Tadawul).
- Hawyia inked a real estate marketing and brokerage contract with Al-Sulaiman Real Estate Company for 1 year, earning commissions on sales and rentals (Tadawul).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,367	-0.9%	8.4%	-1.6%
Div Yield* (%)	3.9%		Turnover (SAR bn)	5.10
PE* (Fwd)	15.5x		Adv/Decline	33 / 226
PE (12m Trailing)	18.3x		50DMA	11,108
PB	2.3x		100DMA	10,907
M.Cap (SAR bn)	9,859		200DMA	11,006

Global Markets	Last close	1D%	YTD%	P/E*
SPX	7,109	-0.2%	4%	21.8x
Nasdaq	24,404	-0.3%	5%	26.9x
FTSE 100	10,609	-0.5%	7%	13.6x
DAX	24,418	-1.2%	0%	16.0x
Shanghai	4,078	-0.1%	3%	17.4x
Nikkei	59,356	0.9%	18%	23.4x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	94.6	-0.9%	55%	43%
WTI (US\$/b)	88.3	-1.4%	55%	48%
NG (US\$/mmbtu)	2.7	-1.3%	-28%	-12%
Gold (US\$/t)	4,783	-0.8%	11%	40%
Copper (US\$/t)	13,275	-0.5%	7%	44%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	98.1	0.0%	0%	0%
CNY/USD	6.8	0.0%	3%	7%
USD/EUR	1.18	-0.1%	0%	2%
USD/GBP	1.35	-0.1%	0%	1%
Bitcoin (US\$)	75,775	-0.7%	-14%	-13%

Rates	Spot	% chg
SOFR (%) - Overnight	3.65	0.0
SAIBOR (%) - 3M	4.79	0.2
SAIBOR (%) - 6M	4.80	-1.8
SAIBOR (%) - 12M	4.76	0.2
US 2Y Govt bond (%)	3.73	0.2
US 10Y Govt bond (%)	4.25	0.0
Saudi 10Y Govt Bond (%)	4.74	-0.1

Source: Bloomberg, *1 year forward Bloomberg consensus

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Index Movers

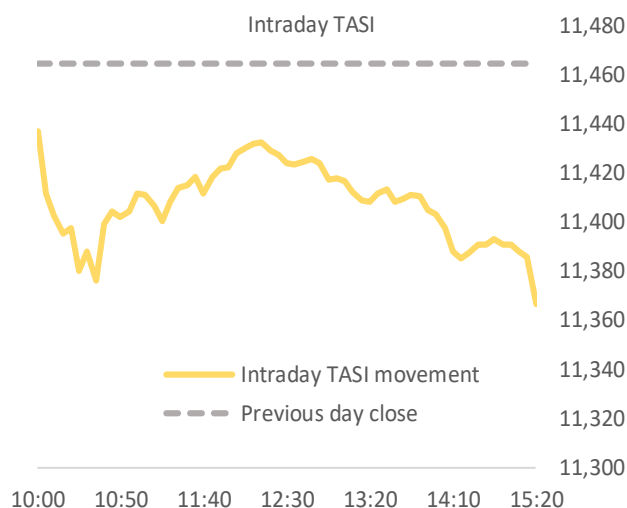
Up	1D%	Down	1D%
Jarir	3.3%	Al Rajhi	-1.2%
MCDC	1.6%	Maaden	-2.1%
Bahri	0.9%	Acwa Power	-2.1%
SECO	1.1%	SABIC	-1.9%
Rasan	1.6%	AlHabib	-1.6%

Top Gainers	Last Price	1D%
Jarir	15.08	3.3%
Cherry	26.50	3.1%
Astra	147.80	2.6%
Sadr	2.76	2.6%
Wataniya	14.20	2.2%

Top Losers	Last Price	1D%
CARE	126.20	-4.6%
Saudi Cable	148.20	-4.5%
SRMG	78.20	-4.4%
Miahona	16.69	-4.3%
RAOOM	73.85	-4.1%

Most active by Vol	Last Price	Vol
Americana	1.88	25.11MLN
APC	7.08	14.36MLN
Kayan	5.22	11.62MLN
Aramco	27.20	10.62MLN
Chemical	8.15	8.53MLN

Most active by Val	Last Price	Val (SAR mn)
Al Rajhi	107.10	447
Aramco	27.20	289
SAFCO	156.00	132
Alinma	29.66	128
SNB	41.70	102



Sectorial Performance	Index mover*	1D%
TASI		-0.9%
Banks	-36.8%	-0.9%
Materials	-21.5%	-1.4%
Energy	-0.1%	0.0%
Telecom	-7.0%	-1.0%
Food & Bev.	-1.2%	-0.4%
Media	-1.7%	-3.2%
Healthcare	-7.7%	-1.6%
Capital Goods	-1.4%	-0.4%
Consumer Staples Retail	-1.0%	-1.1%
Consumer Services	-2.0%	-1.4%
Transport	-2.0%	-1.4%
Software	-2.9%	-2.2%
Commercial	-0.7%	-1.3%
Consumer Durables	-0.3%	-1.6%
Utilities	-7.9%	-1.5%
Insurance	-0.5%	-0.2%
Real Estate	-5.5%	-1.1%
Pharma	-0.2%	-0.5%
REITs	-0.2%	-0.3%
Retailing	1.3%	0.6%
Diversified Financials	-1.4%	-1.7%

Source: Bloomberg; *indicates the impact on index movement

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