

# Daily Market Report

2026-06-21

## Market Commentary & News

- ▶ **KSA Market Performance:** The TASI index rose marginally by 0.1% on Thursday. The transportation sector was the top performer, rising 1.0%, with Flynas gaining 3.3% and Cherry edging up 0.7%. The consumer services sector also posted a similar gain (+1.0%), driven by a 2.9% rise in Americana and a 1.5% increase in NCLE. On the downside, the capital goods sector fell 1.0%, weighed down by declines of 2.3% and 1.5% in GAS and Obeikan Glass, respectively.
- ▶ **Today's clues:** US markets were closed on Friday for a public holiday, following a strong rebound in Thursday's session led by semiconductor stocks after the US President announced an Intel-Apple partnership to design chips domestically. Meanwhile, Asian markets traded mostly lower, while crude oil prices rose on Friday after scheduled US-Iran talks in Switzerland were unexpectedly suspended, casting doubt on the durability of the interim peace agreement.

### News

- ▶ Masar signed sale agreements for three land plots within the Masar Destination project for SAR239.8mn (Argaam).
- ▶ Cenomi Centers' BoD proposed to increase share capital by 8.98% through bonus shares in 1:12 ratio and allocating additional shares to ESOP (Tadawul).
- ▶ Equipment House renewed Sharia-compliant credit facilities agreement worth SAR120mn with ANB to finance current and future projects, bank guarantees, and LoCs (Tadawul).
- ▶ Alqemam signed a 36 months SAR19.9mn IT maintenance and operation contract with the Emirate of Hail Region (Tadawul).
- ▶ Miahona signed a PPPA with Uzsvtaminot to enhance, operate & maintain a water treatment plant in Uzbekistan for 25 years. The total contract value is about SAR394mn (Tadawul).
- ▶ CMA approved Naseej's request to increase its capital by issuing rights shares amounting to SAR163.5mn (Tadawul).
- ▶ MIS signed a 36-month SAR64.8mn contract with National Water Co. to provide IT services (Tadawul).
- ▶ Al-Arabia signed contracts with Cluster2 Airports Co. for an advertising opportunity at 18 airports across the Kingdom for 10 years (Argaam).
- ▶ Almasar Alshamil signed a non-binding MoU, valid till 30 Sep 2026 and extendable, to study potential acquisition of a 60% stake in Al Qalam Educational (Argaam).
- ▶ Saudi Arabia's rank in the 2026 World Competitiveness Yearbook, published by the IMD Competitiveness Center, improved to 13<sup>th</sup> from 17<sup>th</sup> in 2025 (Argaam).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,121	0.1%	6.0%	4.8%
Div Yield* (%)	4.1%	Turnover (SAR bn)	6.54	
PE* (Fwd)	14.5x	Adv/Decline	115 / 133	
PE (12m Trailing)	17.3x	50DMA	11,147	
PB	2.2x	100DMA	11,098	
M.Cap (SAR bn)	9,648	200DMA	11,025	

Global Markets	Last close	1D%	YTD%	P/E*
SPX	7,501	1.1%	10%	22.1x
Nasdaq	26,518	1.9%	14%	29.5x
FTSE 100	10,363	-0.4%	4%	13.0x
DAX	24,986	-0.2%	2%	16.1x
Shanghai	4,090	-0.4%	3%	14.5x
Nikkei	71,250	0.3%	42%	24.9x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	80.6	0.9%	32%	2%
WTI (US\$/b)	76.5	0.9%	34%	15%
NG (US\$/mmbtu)	3.2	-1.1%	-13%	-17%
Gold (US\$/t)	4,156	-1.3%	-4%	23%
Copper (US\$/t)	13,595	-0.7%	9%	41%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	100.8	0.0%	3%	2%
CNY/USD	6.8	-0.1%	3%	6%
USD/EUR	1.15	0.1%	-2%	0%
USD/GBP	1.32	0.2%	-2%	-2%
Bitcoin (US\$)	64,172	0.5%	-27%	-38%

Rates	Spot	% chg
SOFR (%) - Overnight	3.63	0.0
SAIBOR (%) - 3M	4.72	0.7
SAIBOR (%) - 6M	5.10	0.3
SAIBOR (%) - 12M	4.84	-0.5
US 2Y Govt bond (%)	4.18	0.0
US 10Y Govt bond (%)	4.45	0.0
Saudi 10Y Govt Bond (%)	4.91	-0.1

Source: Bloomberg, \*1 year forward Bloomberg consensus

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## Index Movers

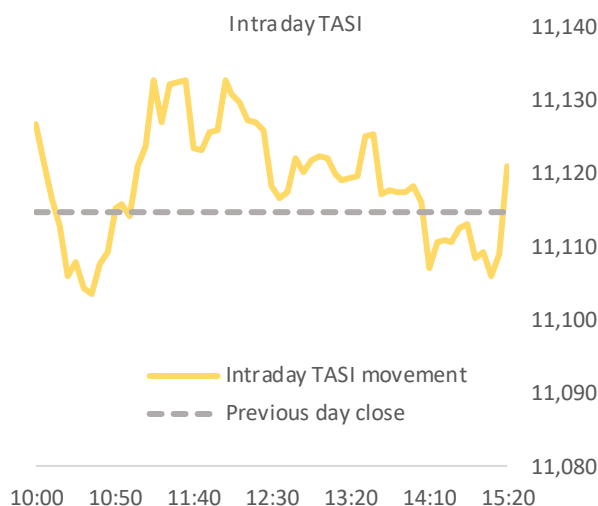
Up	1D%	Down	1D%
Maaden	3.1%	Al Rajhi	-0.7%
SNB	1.5%	Aramco	-0.3%
Saudi Energy	3.0%	SABIC	-1.4%
MASAR	3.8%	Acwa Power	-0.5%
ANB	1.5%	Riyad Bank	-0.6%

Top Gainers	Last Price	1D%
LIVA	13.20	7.1%
Munajem	66.00	4.7%
MIS	213.80	4.0%
MASAR	16.82	3.8%
Flynas	59.30	3.3%

Top Losers	Last Price	1D%
Al Etihad	6.33	-3.1%
Kingdom	12.72	-2.9%
Thimar	33.62	-2.8%
Taiba	19.53	-2.8%
SIDC	16.44	-2.7%

Most active by Vol	Last Price	Vol
Americana	2.10	39.08MLN
Aramco	26.52	22.85MLN
PetroRabigh	12.40	14.36MLN
Maaden	64.80	8.21MLN
DBS	13.24	8.11MLN

Most active by Val	Last Price	Val (SAR mn)
Aramco	26.52	605
Maaden	64.80	530
Al Rajhi	66.75	528
SNB	41.60	267
STC	44.66	196



Sectorial Performance	Index mover*	1D%
TASI		0.1%
Banks	-1.2%	0.0%
Materials	138.0%	0.6%
Energy	-88.7%	-0.3%
Telecom	-42.9%	-0.4%
Food & Bev.	12.2%	0.2%
Media	-6.3%	-0.8%
Healthcare	6.9%	0.1%
Capital Goods	-44.5%	-1.0%
Consumer Staples Retail	0.6%	0.0%
Consumer Services	21.5%	1.0%
Transport	23.6%	1.0%
Software	-14.7%	-0.6%
Commercial	-5.6%	-0.6%
Consumer Durables	0.0%	0.0%
Utilities	12.7%	0.1%
Insurance	28.9%	0.6%
Real Estate	43.1%	0.6%
Pharma	5.1%	0.8%
REITs	-0.3%	0.0%
Retailing	-7.7%	-0.2%
Diversified Financials	-11.7%	-0.9%

Source: Bloomberg; \*indicates the impact on index

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