

Daily Market Report

2026-04-14

Market Commentary & News

► **KSA Market Performance:** The TASI index rebounded 1.0% on Monday, supported by a 0.8% uptick in the banking sector, driven by SNB (+2.7%), SAB (+1.9%), and Riyadh Bank (+2.3%). The Energy and Materials sector also gained 1.6% and 1.8%, respectively. Solutions hit the upper circuit after the bonus issue announcement, while Tasheel and Maaden were up by 3.3% and 3.2% respectively. Among the top losers were Saptco (-4.0%), Raydan (-3.4%), Enaya (-2.8%), and SRMG (-2.5%).

► **Today's clues:** US markets rallied amid hopes of a peace deal in the Middle East conflict, alongside a rebound in software companies, recovering all losses since the start of the Middle East conflict. Asian markets are trading higher, mirroring Wall Street gains. Oil prices fell on easing geopolitical tensions.

News

- Academy of Learning's subsidiary signed a SAR332.4mn 30-year lease with High Standards Real Estate Company for an educational complex in Riyadh (Tadawul).
- SVCP's subsidiary, Saudi Land Factory, secured a SAR8.2mn purchase order from AWPT to manufacture and supply concrete manholes for a sewage project for 1 year (Tadawul).
- Ladun awarded Riyadh bus stations protection works project worth SAR85.0mn to its subsidiary, Built Industrial Company, by the Royal Commission for Riyadh City (Tadawul).
- Alsaif Gallery's board announced a cash dividend of SAR0.06/sh for 2H25, resulting in an annual yield of 0.9% (Tadawul).
- MESC signed a SAR100.0mn Sharia-compliant banking facilities agreement with SAB, valid till March 2027 (Tadawul).
- Networkers renewed a SAR50.0mn credit facilities agreement with Alrajhi Bank, valid till October 2026 (Tadawul).
- Luberef's shareholders approved SAR588.9mn (SAR3.5/share) dividend for 2H25 at the AGM (Tadawul).
- Yamama Cement shareholders approved SAR202.5mn dividend (SAR1.0/share) for 2025, at the AGM (Tadawul).
- As per GASTAT's Tourism Establishments Statistics bulletin, KSA's hotel occupancy rate rose to 57.3% in 4Q25 (vs. 56.0% in 4Q24), while serviced apartments stood at 55.9% (Argaam).
- KSA's Ministry of Finance implemented the Financial Oversight Law to enhance governance of public funds and improve oversight efficiency in line with Vision 2030 (Argaam).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,427	1.0%	8.9%	-1.5%
Div Yield* (%)	3.9%	Turnover (SAR bn)	6.73	
PE* (Fwd)	15.7x	Adv/Decline	129 / 127	
PE (12m Trailing)	18.3x	50DMA	11,092	
PB	2.3x	100DMA	10,884	
M.Cap (SAR bn)	9,973	200DMA	10,998	

Global Markets	Last close	1D%	YTD%	P/E*
SPX	6,886	1.0%	1%	21.2x
Nasdaq	23,184	1.2%	0%	25.6x
FTSE 100	10,583	-0.2%	7%	13.7x
DAX	23,742	-0.3%	-3%	15.6x
Shanghai	3,997	0.2%	1%	16.7x
Nikkei	57,818	2.3%	15%	22.7x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	98.5	-0.8%	62%	52%
WTI (US\$/b)	97.4	-1.7%	71%	64%
NG (US\$/mmbtu)	2.6	-0.8%	-29%	-22%
Gold (US\$/t)	4,766	0.5%	10%	48%
Copper (US\$/t)	13,054	1.6%	5%	43%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	98.3	-0.1%	0%	-1%
CNY/USD	6.8	0.2%	2%	7%
USD/EUR	1.18	0.0%	0%	4%
USD/GBP	1.35	0.1%	0%	2%
Bitcoin (US\$)	74,360	1.6%	-15%	-12%

Rates	Spot	% chg
SOFR (%) - Overnight	3.61	0.0
SAIBOR (%) - 3M	4.82	1.3
SAIBOR (%) - 6M	5.26	-0.4
SAIBOR (%) - 12M	4.71	-1.3
US 2Y Govt bond (%)	3.77	-0.1
US 10Y Govt bond (%)	4.28	-0.3
Saudi 10Y Govt Bond (%)	4.87	-0.2

Source: Bloomberg, *1 year forward Bloomberg consensus

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Index Movers

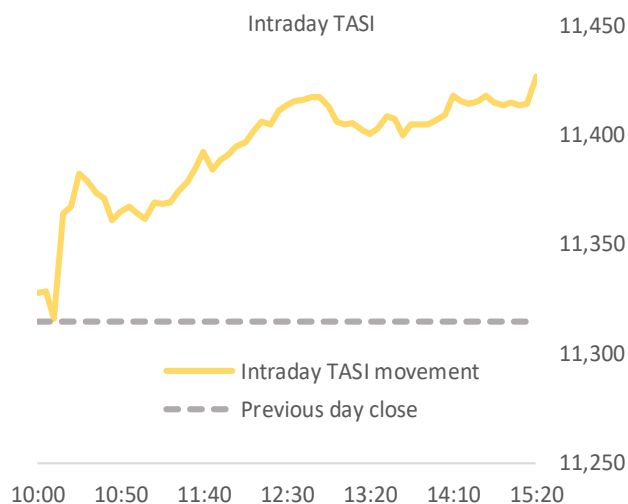
Up	1D%	Down	1D%
Aramco	1.6%	Al Rajhi	-0.5%
SNB	2.7%	Dar AlArkan	-1.4%
Maaden	3.2%	Bahri	-1.0%
SAFCO	4.8%	MASAR	-1.4%
Riyad Bank	2.3%	SRMG	-2.5%

Top Gainers	Last Price	1D%
STC Solutions	219.40	10.0%
Wafrah	22.35	5.3%
Almoosa	142.00	5.0%
ZainKSA	12.05	5.0%
SAFCO	156.90	4.8%

Top Losers	Last Price	1D%
SAPTCO	11.01	-4.0%
Raydan	17.66	-3.4%
BATIC	2.22	-3.1%
LIVA	10.18	-2.9%
Enaya	8.70	-2.8%

Most active by Vol	Last Price	Vol
Aramco	27.60	23.59MLN
BATIC	2.22	15.54MLN
Americana	1.88	13.48MLN
Chemical	8.00	11.75MLN
APC	6.27	10.88MLN

Most active by Val	Last Price	Val (SAR mn)
Al Rajhi	107.60	658
Aramco	27.60	647
SNB	43.94	266
SAFCO	156.90	210
STC Solutions	219.40	186



Sectorial Performance	Index mover*	1D%
TASI		1.0%
Banks	29.2%	0.8%
Materials	22.9%	1.8%
Energy	26.0%	1.6%
Telecom	7.3%	1.2%
Food & Bev.	0.8%	0.3%
Media	-0.9%	-1.9%
Healthcare	2.5%	0.6%
Capital Goods	2.2%	0.9%
Consumer Staples Retail	1.2%	1.6%
Consumer Services	-1.0%	-0.8%
Transport	-0.1%	-0.1%
Software	2.9%	2.8%
Commercial	0.4%	0.9%
Consumer Durables	0.1%	1.0%
Utilities	4.7%	1.1%
Insurance	-0.1%	0.0%
Real Estate	-2.0%	-0.5%
Pharma	0.2%	0.6%
REITs	0.1%	0.2%
Retailing	1.1%	0.6%
Diversified Financials	0.8%	1.1%

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