

Daily Market Report

2026-06-22

Market Commentary & News

- ▶ **KSA Market Performance:** The TASI index slid 0.4% on Sunday, with nearly all sectors closing in the red. The consumer discretionary sector declined the most by 2.2%, weighed down by Jarir (-3.8%) and Cenomi Retail (-1.8%). The insurance sector also declined 2.2%, led by losses in Liva (-5.3%) and Bupa Arabia (-3.1%). Conversely, the F&B sector was the top gainer, rising 0.7%, aided by ~10.0% surge in SFICO and a 3.7% rise in TADCO, which submitted its capital reduction application last week.
- ▶ **Today's clues:** US equity futures are trading lower this morning as investors assess developments in US-Iran peace negotiations while awaiting domestic inflation data. Asian markets are trading mixed. Meanwhile, crude oil prices have eased, with Brent falling below the USD 80/bbl mark after Pakistan and Qatar stated that the US and Iran had agreed on a roadmap to reach a final deal within 60 days.

News

- ▶ KHC's BoD proposed SAR0.27/share exceptional interim cash dividend for 1H26, implying 4.3% annualized yield (Tadawul).
- ▶ Anaam Holding signed a renewable, 180-days non-binding MoU for a potential acquisition of up to 51% stake in Masar Al-Ola Trading (Tadawul).
- ▶ S&P Global Ratings accorded A- credit rating to ARDCO with a stable outlook, reflecting its financial strength and discipline, and high-quality income generating assets (Tadawul).
- ▶ Multi Business Group said its contract with Leejam to design and build a sports club in KAFD has been scrapped (Argaam).
- ▶ Sport Clubs opened two new clubs in Buraydah, Qassim Region, taking the total number of operating clubs to 63 (Tadawul).
- ▶ Osool & Bakheet launched SAR713mn closed-ended private real estate investment fund to acquire a land plot in Al Khobar to develop a luxury hotel (Argaam).
- ▶ Alshehili Metal received SAR11.8mn order from Almarai for manufacturing refrigerated transport boxes (Tadawul).
- ▶ Keir International signed a SAR130mn strategic cooperation agreement with Metsco Heavy Steel to collaborate in various infrastructure projects in Saudi Arabia (Tadawul).
- ▶ Al Rajhi Takaful's shareholders approve increasing share capital by 100% through bonus shares issuance (Tadawul).
- ▶ Yanbu Cement said financial impact of fuel price adjustment led to an increase in production costs by about 4% (Argaam).
- ▶ Asas Makeen renewed SAR350mn Sharia-compliant credit facilities agreement with Al Rajhi Bank for up to 120 months (Tadawul).

Saudi Market	Last close	1D%	YTD%	1Y%
TASI	11,077	-0.4%	5.6%	4.8%
Div Yield* (%)	4.1%	Turnover (SAR bn)	2.79	
PE* (Fwd)	14.5x	Adv/Decline	95 / 164	
PE (12m Trailing)	17.2x	50DMA	11,143	
PB	2.2x	100DMA	11,101	
M.Cap (SAR bn)	9,616	200DMA	11,027	

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	4,149	1.4%	5%	14.5x
Nikkei	72,434	1.7%	44%	24.9x

Commodities	Spot	1D%	YTD%	1Y%
Brent (US\$/b)	78.9	-2.0%	30%	2%
WTI (US\$/b)	75.2	-0.8%	32%	13%
NG (US\$/mmbtu)	3.3	1.4%	-11%	-15%
Gold (US\$/t)	4,198	1.0%	-3%	25%
Copper (US\$/t)	13,595	-0.7%	9%	41%

Key Currencies	Spot	1D%	YTD%	1Y%
Dollar Index	100.9	0.1%	3%	2%
CNY/USD	6.8	-0.1%	3%	6%
USD/EUR	1.15	-0.1%	-2%	-1%
USD/GBP	1.32	-0.2%	-2%	-2%
Bitcoin (US\$)	64,054	0.4%	-27%	-36%

Rates	Spot	% chg
SOFR (%) - Overnight	3.63	0.0
SAIBOR (%) - 3M	4.70	-0.6
SAIBOR (%) - 6M	5.18	1.4
SAIBOR (%) - 12M	4.86	0.5
US 2Y Govt bond (%)	4.22	1.0
US 10Y Govt bond (%)	4.48	0.6
Saudi 10Y Govt Bond (%)	4.92	-0.1

Source: Bloomberg, *1 year forward Bloomberg consensus

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Index Movers

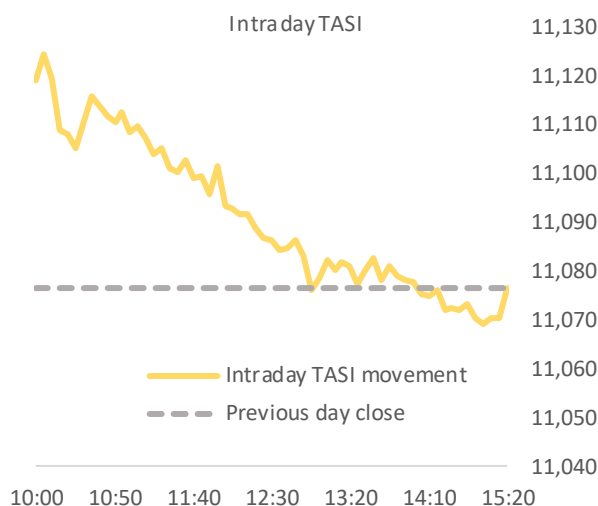
Up	1D%	Down	1D%
Al Rajhi	0.4%	Maaden	-2.0%
Bahri	2.8%	Acwa Power	-2.0%
AlMarai	1.4%	SNB	-0.6%
SAFCO	0.9%	STC	-1.0%
AlHabib	0.4%	Aramco	-0.2%

Top Gainers	Last Price	1D%
Saudi Fish.	44.96	10.0%
Tamkeen	48.48	4.0%
Maadaniyah	12.35	3.8%
Tabuk Agri	6.74	3.7%
SVCP	16.70	3.7%

Top Losers	Last Price	1D%
LIVA	12.50	-5.3%
Jarir	16.10	-3.8%
Budget Saudi	33.34	-3.3%
Al Munajem	63.90	-3.2%
Bupa Arabia	185.00	-3.1%

Most active by Vol	Last Price	Vol
Americana	2.09	30.45MLN
BAAN	2.08	9.80MLN
PetroRabigh	12.56	8.34MLN
Saudi Darb	2.16	7.49MLN
Kayan	5.36	4.84MLN

Most active by Val	Last Price	Val (SAR mn)
Al Rajhi	67.00	143
Aramco	26.46	115
PetroRabigh	12.56	107
SABIC	54.00	101
Acwa Power	197.40	96



Sectorial Performance	Index mover*	1D%
TASI		-0.4%
Banks	-3.3%	0.0%
Materials	-18.8%	-0.6%
Energy	-6.2%	-0.2%
Telecom	-9.5%	-0.6%
Food & Bev.	5.5%	0.7%
Media	0.1%	0.1%
Healthcare	-2.8%	-0.3%
Capital Goods	-2.9%	-0.5%
Consumer Staples Retail	-0.6%	-0.3%
Consumer Services	-2.0%	-0.7%
Transport	-4.3%	-1.3%
Software	-3.8%	-1.1%
Commercial	-0.1%	0.0%
Consumer Durables	-0.2%	-0.6%
Utilities	-20.8%	-1.6%
Insurance	-15.8%	-2.2%
Real Estate	-5.2%	-0.5%
Pharma	-1.0%	-1.1%
REITs	-0.1%	-0.1%
Retailing	-10.6%	-2.2%
Diversified Financials	-1.4%	-0.8%

Source: Bloomberg; *indicates the impact on index

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