

Sunday, 22 December 2024

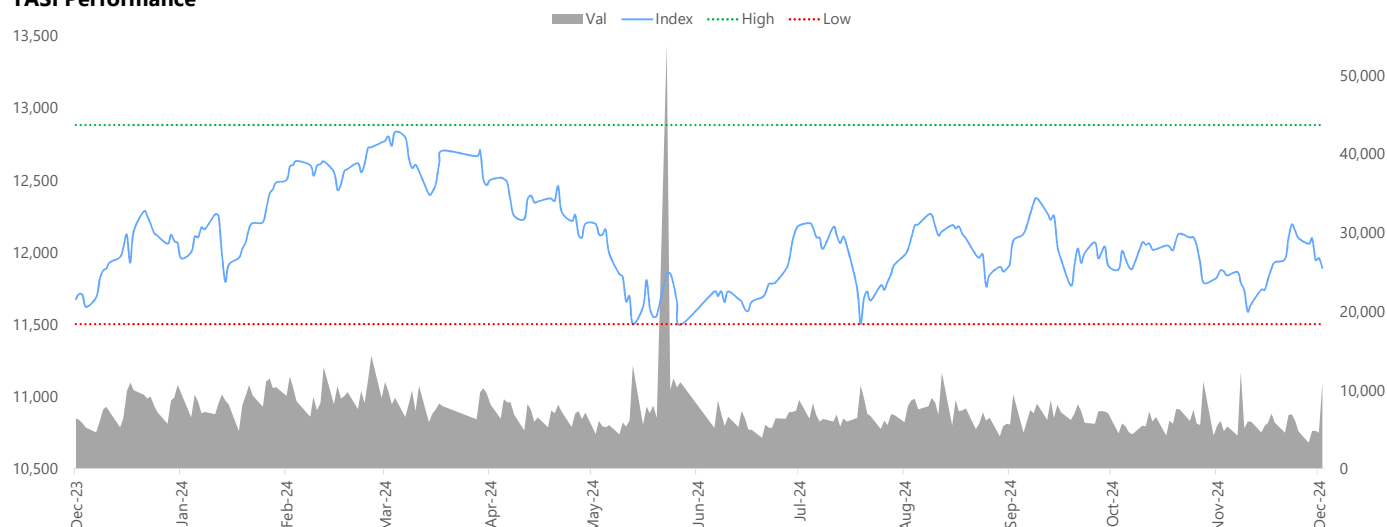
Main Market TASI

Last Close			Value Traded (SR bn)			Index Performance		
▼	11,892.4		▲	10.9		▼	-0.6%YTD	
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
-0.6%	2.2%	-0.6%	139.0%	-6.4%	-23.2%	1.9%	5.1%	44.1%

Nomu Market

Last Close			Value Traded (SR mn)			Index Performance		
▲	31,444.2		▼	54.2		▲	28.2%YTD	
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
0.8%	3.5%	28.2%	-6.7%	67.1%	27.1%	33.4%	21.2%	376.5%

TASI Performance



Markets Performance/News

- US market performance was positive on Friday, with DJIA Index gaining 1.2%, followed by S&P500 Index closing 1.1% higher and Nasdaq Index up 1.0%. All of the S&P500's sector indices were positive, led by Real Estate, up 1.8%. The latest data showed Personal Consumption Expenditure (PCE) Index increased 2.4% YoY in Nov'24 vs 2.3% YoY in Oct'24, and the inflation reading had been lower than consensus expectations of 2.5%. (Reuters/Bloomberg)
- Tadawul All Share Index (TASI) declined by 0.6% on Thursday, closing 69 points lower, though the value traded increased by 2.4x DoD. Savola Group (SAVOLA AB) was the top-performing stock, gaining nearly 10%, followed by Middle East Specialized Cables Co. (MESC AB), which was up 5%, and Arabian Centres Co. (CENOMICE AB), which gained 4%. Sector-wise, Energy Index posted the highest gain, up nearly 1.9%. (Tadawul)

Major Corporate News

- Gulf Union Al Ahlia Cooperative Insurance Co. (GULFUNI AB) obtained the Insurance Authority's approval on a product named Comprehensive Insurance of Motor Vehicles Financially Leased to Individuals. (Tadawul)
- Fourth Milling Co. (FOURTHMI AB) announced the relocation of its headquarters in Dammam from the King Abdul-Aziz Port area to the Al-Safa District. (Tadawul)
- Altharwah Albashariyyah Co. (THARWAH AB) signed an MoU with the Hail Region Development Authority and the Ta'alum Education Support Association to focus on providing 400 training and qualification courses for children from families receiving social security benefits, supported by Ta'alum. (Tadawul)
- Multi Business Group Co. (MULTIBUS AB) signed a contract with Naif Arab University for Security Sciences to renovate the Artificial Intelligence Center building. The project value exceeds 10% of the company's total revenue for 2023 and is for a duration of nine months. According to the announcement, a positive financial impact is expected in 2025. (Tadawul)
- Theeb Rent a Car Co. (THEEB AB) opened a new branch in Makkah, located in the Al-Nawariyah District, making it the 61st branch across the country. (Tadawul)

Event Calendar		
Date	Company	Event
23-Dec-24	Banque Saudi Fransi	Ex-bonus Date
	Arabian Contracting Services Co	Ex-bonus Date
	Almoosa Health Co	Retail Offering
24-Dec-24	Nice One Beauty Digital Marketing Co	Retail Offering
	Shmoh Almadi Co	Book-building

Source: Argam

TASI Intraday Performance



Top Performers - Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Energy Industry	5,475.2	1.9%	5.4%	-11.9%
Food & Beverages	6,079.5	0.7%	7.5%	8.4%
Media	32,998.3	0.7%	8.5%	34.5%
Retailing	7,693.4	0.4%	-1.0%	-9.8%
REITs	3,176.5	0.1%	0.1%	-13.4%

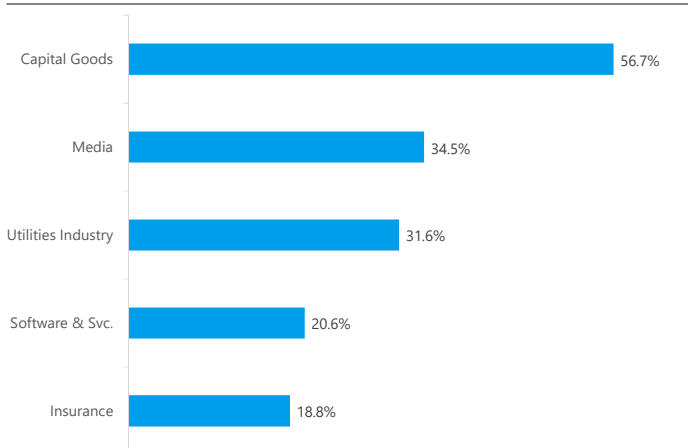
Top Performers - Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Savola Group	37.0	10.0%	14.4	525.1
Middle East Specialized Cables	41.9	5.1%	1.0	40.8
Arabian Centres	21.6	3.9%	6.6	143.2
Bawan Co.	57.0	3.6%	0.8	43.5
Al-Baha Investment & Development	0.3	3.2%	109.7	34.5

Value Leaders - Companies

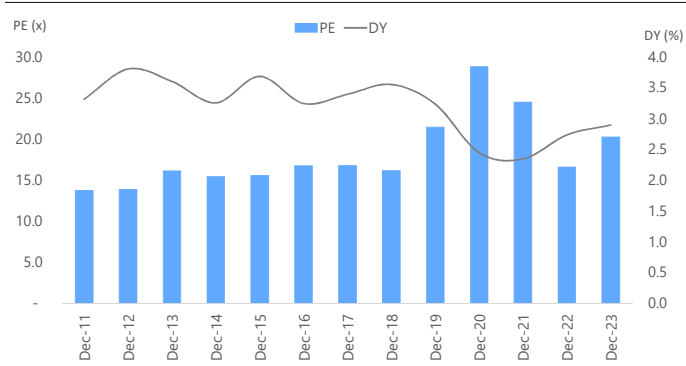
	Last Close	%Δ	Vol (mn)	Val (SR mn)
Saudi Arabian Oil	29.0	1.9%	101.3	2,926.3
Al Rajhi Bank	89.9	-2.6%	10.5	946.2
Savola Group	37.0	10.0%	14.4	525.1
Alinma Bank	28.0	-1.1%	11.2	312.2
Riyadh Cables Group	146.0	0.0%	2.0	296.1

Top Performers - Sectors YTD Performance



Source: Bloomberg

Historical Tadawul PE and DY



Top Laggards - Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Utilities Industry	13,079.3	-2.0%	2.5%	31.6%
Consumer Stap Dist & Ret	8,417.4	-1.6%	-0.4%	-13.0%
Banks	11,804.6	-1.6%	1.4%	-3.2%
Commercial & Prof. Svc.	4,884.2	-1.4%	-1.7%	-12.1%
Consumer Dura & App.	5,290.5	-1.2%	1.0%	5.3%

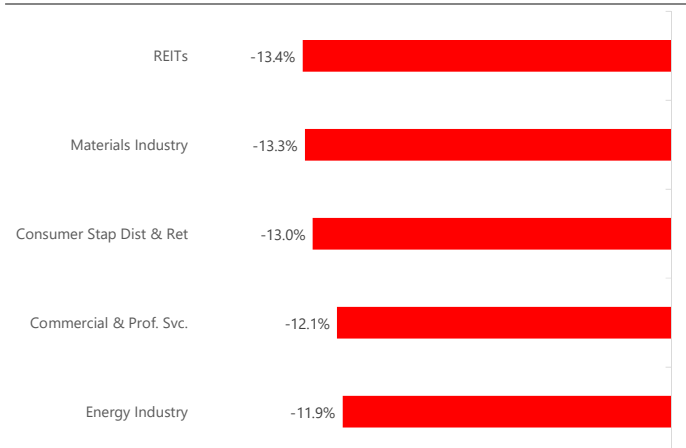
Top Laggards - Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Fitaihi Holding Group	4.1	-6.7%	9.6	39.6
Arabian Contracting Services	156.4	-4.2%	0.5	73.4
AYYAN Investment	14.4	-3.9%	0.9	13.5
Raydan Food Co	22.1	-3.3%	0.3	7.4
East Pipes Integrated	135.0	-3.3%	0.2	30.6

Volume Leaders - Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Al-Baha Investment & Development	0.3	3.2%	109.7	34.5
Saudi Arabian Oil	29.0	1.9%	101.3	2,926.3
Anaam International Holding	1.3	-2.3%	21.8	27.6
Tourism Enterprise	1.0	-2.1%	18.6	17.7
Savola Group	37.0	10.0%	14.4	525.1

Top Laggards - Sectors YTD Performance



Source: Bloomberg

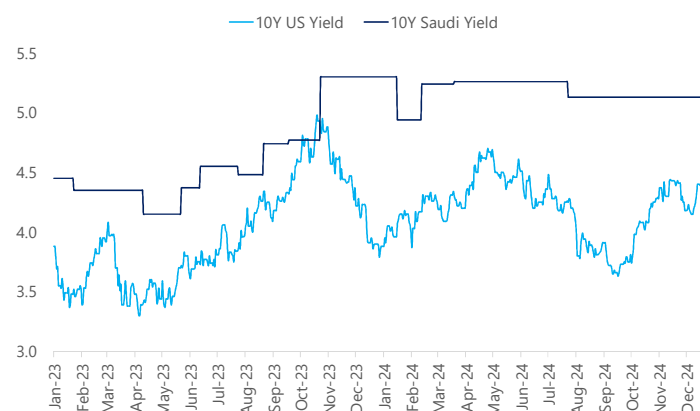
International Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
MSCI (World)	3,723.2	0.7%	-2.3%	17.5%
MSCI (EM)	1,072.3	-0.9%	-0.6%	4.7%
US (S&P500)	5,930.9	1.1%	-1.7%	24.3%
Nasdaq (CCMP Index)	19,572.6	1.0%	1.8%	30.4%
UK (FTSE 100)	8,084.6	-0.3%	-2.4%	4.5%
EURO (STOXX 600)	502.2	-0.9%	-1.6%	4.8%
GER (DAX)	19,884.8	-0.4%	1.3%	18.7%
JAP (NIKKEI 225)	38,701.9	-0.3%	1.3%	15.7%
CHN (SHCOMP)	3,368.1	-0.1%	1.3%	13.2%
Hong Kong (HSI)	19,720.7	-0.2%	1.5%	15.7%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	69.5	-0.6%	2.1%	-3.1%
Brent (USD/bbl)	72.9	0.1%	0.0%	-5.3%
US Natural Gas (USD/mmbtu)	3.7	4.6%	11.4%	49.1%
Gold (USD/oz)	2,622.9	1.1%	-0.8%	27.1%
Silver (USD/oz)	29.5	1.6%	-3.6%	24.1%
Naphtha (USD/ton)	608.7	0.1%	-2.3%	-4.1%
Ethylene (USD/ton)	930.0	0.0%	0.0%	8.8%
Urea (USD/ton)	362.5	4.3%	4.8%	12.4%
Sugar (USD/ton)	19.5	0.6%	-7.4%	-5.2%
Wheat (USD/ton)	533.0	0.0%	0.1%	-15.1%
Cotton (USD/lb)	68.1	0.2%	-5.4%	-14.5%
Aluminum (USD/ton)	2,534.5	1.1%	-2.3%	6.3%

Bond Yield Rates (%)



Source: Bloomberg

Regional Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
Saudi (TASI)	11,892.4	-0.6%	2.2%	-0.6%
Dubai (DFM)	5,057.3	0.2%	4.3%	24.6%
Abu Dhabi (ADX)	9,351.3	0.8%	1.3%	-2.4%
Kuwait (KSE)	7,799.5	0.0%	0.4%	4.3%
Qatar (QE)	10,458.7	0.0%	0.4%	-3.4%
Oman (MSM)	4,508.7	0.9%	-1.2%	-0.1%
Bahrain (BHBX)	2,000.6	-0.2%	-1.5%	1.5%
Egypt (EGX)	11,532.9	-0.1%	1.3%	46.4%
Lebanon (BSX)	2,312.9	1.4%	7.7%	15.9%
Morocco (MASI)	14,724.0	-0.3%	-0.8%	21.8%

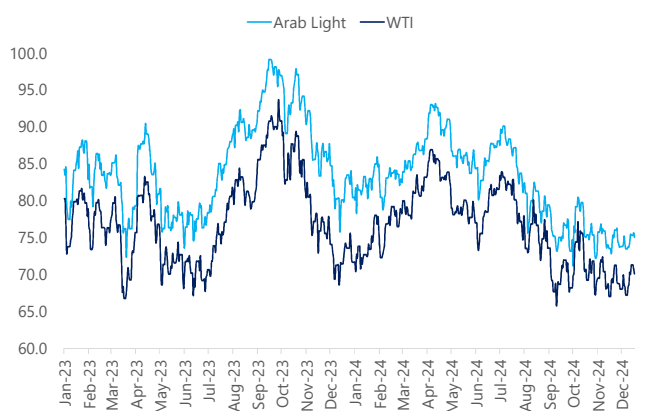
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.42	(38) bps	(19) bps	(82) bps
KSA SAIBOR 6M	5.36	(8) bps	(17) bps	(72) bps
SOFR 3M	4.76	(0) bps	(16) bps	(60) bps
SOFR 6M	5.09	(0) bps	(8) bps	(25) bps

Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.76	0.1%	0.1%	0.2%
GBP	0.80	0.6%	1.9%	1.8%
EUR	0.97	-0.1%	2.1%	6.5%
JPY	157.44	1.7%	5.1%	11.6%
CHF	0.90	-0.3%	2.0%	6.8%
CNY	7.30	0.1%	0.7%	2.8%

Global Oil Price (USD/bbl)



Source: Bloomberg

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