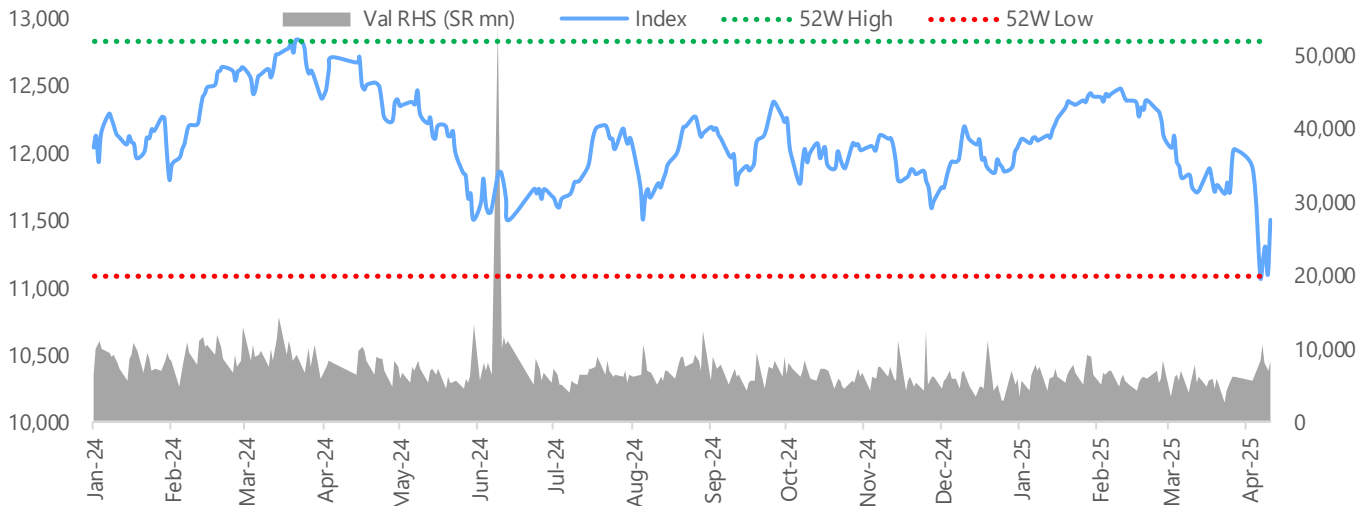


Daily Market Watch

Sunday, April 13, 2025

Main Market TASI						Nomu Market											
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▲ 11,502.5			▲ 8.3			▼ -4.4% YTD			▲ 28,924.6			▲ 38.8			▼ -8.1% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
3.7%	-4.3%	-4.4%	21.8%	4.5%	-19.0%	-9.5%	-14.1%	64.2%	2.0%	-7.0%	-8.1%	52.6%	-45.3%	34.5%	10.2%	19.3%	360.1%

TASI Performance



Markets Performance/News

- U.S. stocks closed the week higher, with the S&P 500 up 1.8%, the Nasdaq gaining 2.1%, and the Dow rising 1.6% on Friday, supported by assurance from Boston Fed President Susan Collins and strong 1Q bank earnings. It marked the best week for the S&P 500 and Dow since November 2023, and for the Nasdaq since November 2022. Cooling inflation data also boosted sentiment, though consumer confidence dipped. In Asia, Japan's Nikkei 225 (N225) fell 3% on a stronger yen and earnings concerns, while China's CSI 300 (CSI300) rose 0.41% following regulatory measures to curb selling. (Reuters)
- TASI recorded an increase of 3.7% (405.9 points), closing at 11,503. Trading value experienced an increase of 21.8% compared to the previous session. The Software & Services sector witnessed the most significant surge, expanding 7.33%. Among the top performers, Saudi Paper Manufacturing Co. (SPM AB) increased 10.0%, followed by Saudi Chemical Co. (CHEMICAL AB) with an 9.99% uptick, while Ataa Educational Co. (ATAA AB) rose 9.95%. (Tadawul)

Major Economic/Sector News

- The US drilling rig count fell by nine to 480 in the week ended April 11, reaching its lowest level since January, according to Baker Hughes. Meanwhile, the gas rig count rose by one to 97. (Argaam)
- Total sales of Saudi Arabia's 17 cement companies decreased by nearly 2% to 3.6 million tons in March, compared to 3.7 million tons in the same month last year. (Argaam)
- Residential mortgages granted to individuals by banks in Saudi Arabia leapt 28% year-on-year (YoY) to SAR 8.91 billion in February 2025, data issued by the Saudi Central Bank (SAMA) showed. (Argaam)

Major Corporate News

- Saudi Media Co. (SMC) signed a memorandum of understanding (MoU) with Abu Dhabi-listed Multiply Group to explore potential collaboration and mutual investment opportunities in the development of advanced advertising technology platforms. (Argaam)
- The Insurance Authority (IA) published the Complaints Index for the first quarter of 2025, outlining the performance of insurance companies and the volume of escalated complaints submitted by beneficiaries of health and vehicle insurance policies, according to the state-run SPA. (Argaam)

- Saudi Arabia's Ministry of Commerce stated that commercial registrations for cloud computing in Q1 2025 reached 3,200, leaping 33% from 2,500 in the same period last year. (Argaam)
- Lana Medical Co.(LANA AB) was awarded a SAR 7.93 million project by the Health Ministry to collect and store hazardous healthcare waste at Prince Mohammed bin Abdulaziz Hospital in Riyadh. (Argaam)

Event Calendar

Date	Company	Event
13-Apr-25	ALAMAR	Eligibility for Cash Dividend (SAR 0.60/sh)
13-Apr-25	ALRAJHI	Ordinary General Meeting
13-Apr-25	ALRAJHI	Eligibility for Cash Dividend (SAR 1.46/sh)
13-Apr-25	RIBL	Eligibility for Cash Dividend (SAR 0.90/sh)
13-Apr-25	RIBL	Extraordinary General Meeting
13-Apr-25	ALMARAI	Eligibility for Cash Dividend (SAR 1.00/sh)
13-Apr-25	ALMARAI	Extraordinary General Meeting
13-Apr-25	Service Equipment	Start of Offering
13-Apr-25	EIC	Cash Dividend Distribution (SAR 0.125/sh)
13-Apr-25	HORIZON EDUCATIONAL	Eligibility for Cash Dividend (SAR 1.50/sh)

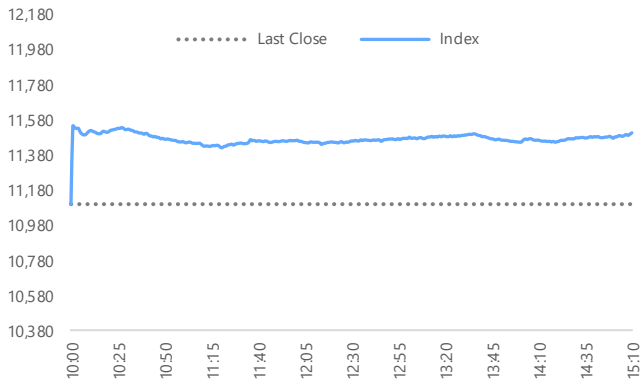
Source: Argaam, Bloomberg

Economic Calendar

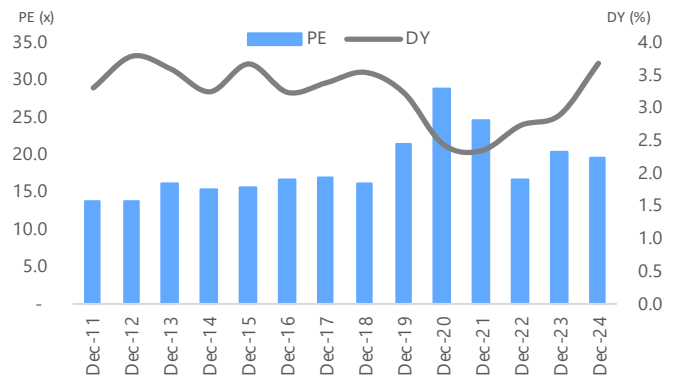
Date	Event	Prior	Estimation
13-Apr-25	NY Fed 1-yr Inflation Expectations	3.1%	-

Source: Argaam, Bloomberg

TASI Intraday Performance



Historical Tadawul PE and DY



Top Performers – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Software & Svc.	73,986.6	7.3%	-0.9%	-9.4%
Capital Goods	12,952.6	6.0%	-6.0%	-14.6%
Healthcare	11,338.6	5.9%	0.3%	-3.5%
Transportation	5,969.7	5.8%	-6.8%	-15.5%
Comm. & Prof. Svc	4,677.7	5.1%	-5.2%	-4.5%

Top Laggards – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
REITs	3,027.0	0.5%	-1.8%	-4.6%
Food & Beverages	5,474.1	1.0%	-3.5%	-9.0%
Media & Ent.	20,599.3	1.2%	-6.1%	-35.5%
Telecom	8,724.7	2.1%	-1.5%	10.9%
Cons. Disc. & Ret.	7,539.8	2.2%	-3.1%	0.2%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Saudi Paper Manufact.	66.0	10.0%	0.5	29.3
Saudi Chemical	8.3	10.0%	10.3	83.8
Ataa Educational	69.6	10.0%	0.1	5.0
Electrical Industries	5.8	9.9%	8.8	50.0
SISCO Holding	28.3	9.9%	1.1	31.5

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
National Learning	160.6	-0.9%	0.1	16.1
SEDCO Capital REIT	7.3	-0.6%	0.2	1.2
Al-Jouf Agricultural	46.3	-0.2%	0.4	18.1
Jadwa REIT Saudi Fund	10.0	-0.2%	0.5	5.1
Riyad REIT Fund	6.1	-0.2%	0.1	0.6

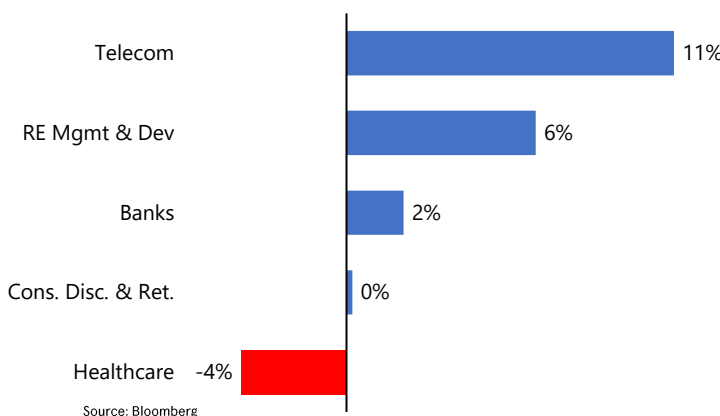
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Al Rajhi Bank	97.6	3.2%	6.8	667.6
Aramco	26.0	2.6%	16.5	428.4
Alinma Bank	28.8	2.7%	13.5	390.8
Saudi National Bank	33.7	5.5%	11.0	366.9
Umm Al Qura	22.8	4.0%	12.2	282.3

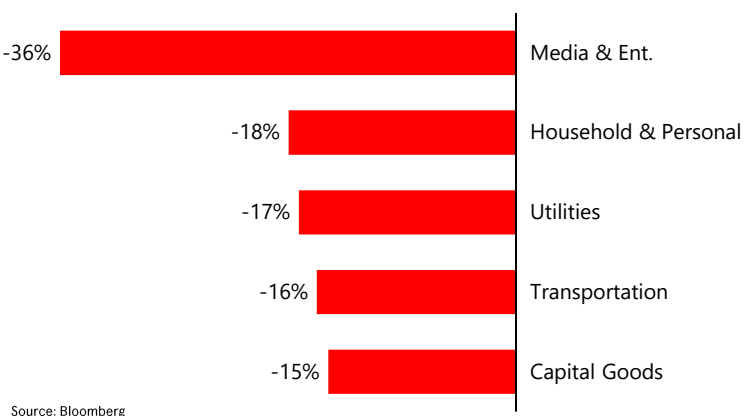
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Americana Res. Int PLC	1.9	7.8%	125.7	241.3
Batic Investments	2.3	6.0%	17.0	38.6
Aramco	26.0	2.6%	16.5	428.4
Tourism Enterprise	0.8	3.9%	16.0	12.9
Alinma Bank	28.8	2.7%	13.5	390.8

Top Performers – Sectors YTD Performance



Top Laggards – Sectors YTD Performance



International Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
MSCI (World)	3,471.3	1.4%	-4.3%	-6.4%
MSCI (EM)	1,045.2	1.6%	-5.1%	-2.8%
US (S&P500)	5,363.4	1.8%	-4.4%	-8.8%
Nasdaq (CCMP Index)	16,724.5	2.1%	-3.3%	-13.4%
UK (FTSE 100)	7,964.2	0.6%	-7.2%	-2.6%
EURO (STOXX 600)	486.8	-0.1%	-8.8%	-4.1%
GER (DAX)	20,374.1	-0.9%	-8.1%	2.3%
JAP (NIKKEI 225)	33,585.6	-3.0%	-5.7%	-15.8%
CHN (SHCOMP)	3,238.2	0.5%	-2.9%	-3.4%
Hong Kong (HSI)	20,914.7	1.1%	-9.5%	4.3%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	61.5	2.4%	-14.0%	-14.2%
Brent (USD/bbl)	64.8	2.3%	-13.4%	-13.2%
US Natural Gas (USD/mmbtu)	3.5	-0.8%	-14.4%	-2.9%
Gold (USD/oz)	3,237.6	1.9%	3.7%	23.4%
Silver (USD/oz)	32.3	3.5%	-5.2%	11.8%
Naphtha (USD/ton)	537.9	1.8%	-11.8%	-12.0%
Ethylene (USD/ton)	925.0	0.0%	0.0%	0.0%
Urea (USD/ton)	375.0	-2.0%	-1.7%	3.4%
Sugar (USD/ton)	18.0	-0.7%	-4.6%	-6.5%
Wheat (USD/ton)	555.8	3.3%	3.5%	0.8%
Cotton (USD/lb)	67.0	0.0%	-1.4%	-5.0%
Aluminum (USD/ton)	2,396.5	1.1%	-5.4%	-6.1%

Regional Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
Saudi (TASI)	11,502.5	3.7%	-4.3%	-4.4%
Dubai (DFM)	4,966.0	-0.2%	-2.6%	-3.7%
Abu Dhabi (ADX)	9,157.9	0.4%	-2.3%	-2.8%
Kuwait (KSE)	8,378.4	1.6%	-3.4%	6.9%
Qatar (QE)	10,095.1	1.9%	-1.3%	-4.5%
Oman (MSM)	4,270.4	0.7%	-2.2%	-6.7%
Bahrain (BHBX)	1,901.8	0.3%	-2.5%	-4.2%
Egypt (EGX)	12,091.4	2.6%	-3.0%	7.8%
Lebanon (BSX)	2,134.6	-5.7%	-7.1%	-18.8%
Morocco (MASI)	16,070.5	-1.9%	-9.5%	8.8%

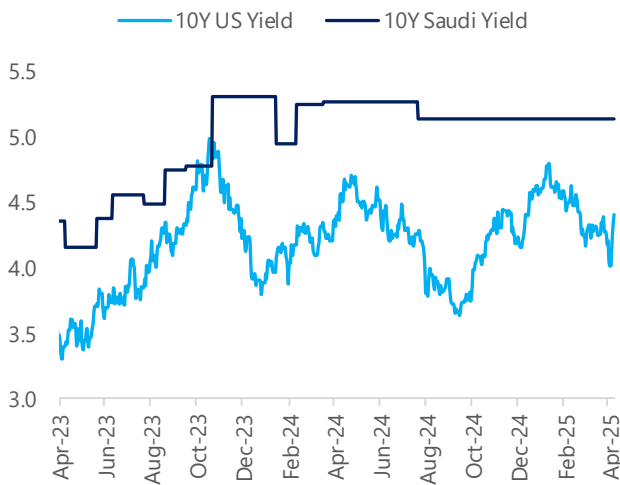
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.35	1 bps	(15) bps	(19) bps
KSA SAIBOR 6M	5.28	2 bps	(16) bps	(18) bps
SOFR 3M	4.36	0 bps	0 bps	(33) bps
SOFR 6M	4.52	(0) bps	(3) bps	(51) bps

Currency (Per USD)

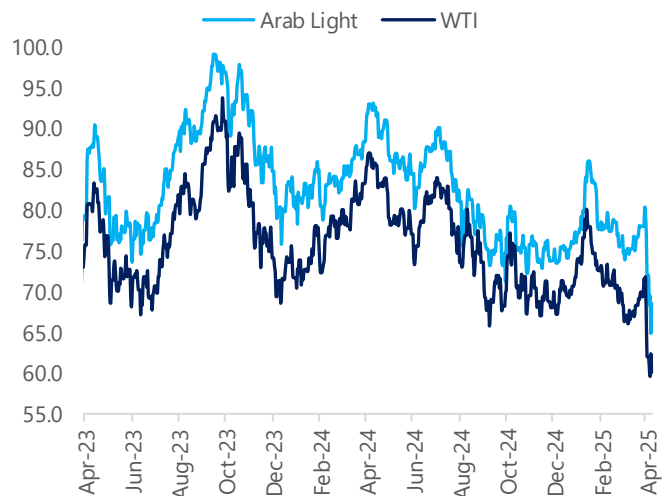
	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	0.1%	-0.0%
GBP	0.76	-0.9%	-1.3%	-4.4%
EUR	0.88	-1.4%	-4.7%	-8.8%
JPY	143.54	-0.6%	-4.3%	-8.7%
CHF	0.81	-1.1%	-7.9%	-10.2%
CNY	7.29	-0.3%	0.5%	-0.1%

Bond Yield Rates (%)



Source: Bloomberg

Global Oil Price (USD/bbl)



Source: Bloomberg

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