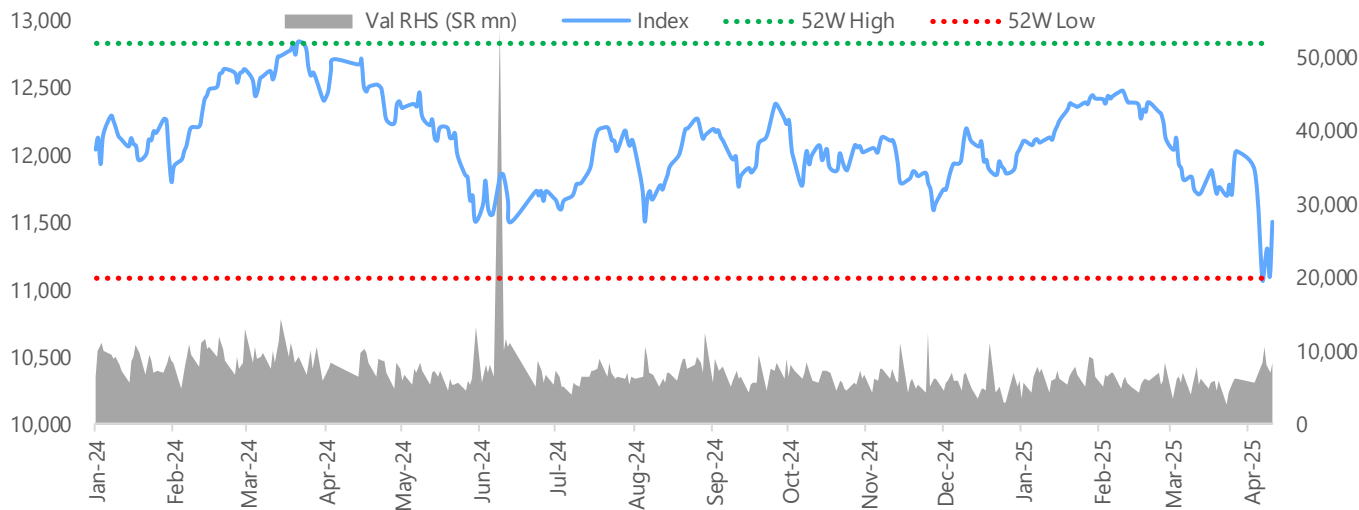


Daily Market Watch

Tuesday, April 15, 2025

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▲ 11,597.4			▲ 6.5			▼ -3.6% YTD			▼ 29,117.6			▼ 26.8			▼ -7.5% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
0.0%	-3.6%	-3.6%	35.0%	5.2%	-18.9%	-8.4%	-14.9%	68.7%	-0.1%	-6.3%	-7.5%	-3.4%	-46.6%	32.1%	10.3%	19.2%	327.0%

TASI Performance



Markets Performance/News

- U.S. stocks ended higher on Monday, with Apple giving the S&P 500 its biggest boost after the White House exempted smartphones and computers from new tariffs. The S&P 500 and NASDAQ rose by 0.8% and 0.6%, respectively. Asian shares edged slightly higher on Tuesday, with the Nikkei 225 and Kospi both up by 0.9%, supported by gains in auto companies after U.S. President Donald Trump suggested he might grant exemptions from existing auto-related levies. (Reuters)
- TASI recorded an increase of 0.04% (4.8 points), closing at 11,597. Trading value experienced an increase of 35.0% compared to the previous session. The Media and Entertainment sector witnessed the most significant surge, expanding 4.0%. Among the top-performing stocks were Allied Cooperative Insurance Group (ACIG AB) and Red Sea International Co. (REDSEA AB), each climbing 10.0%, while Electrical Industries Co. (EIC AB) followed closely with a 9.9% gain. (Tadawul)

Major Economic/Sector News

- Ahmad AlRajhi, Minister of Human Resources and Social Development (HRSD), announced the launch of the National Skills platform to empower the workforce through providing the national talents with vital future-ready skills. (Argaam)
- Remittances by expatriates in Saudi Arabia rose by 37% year-on-year (YoY) to around SAR 12.8 bn in February 2025, according to data released by the Saudi Central Bank (SAMA). (Argaam)

Major Corporate News

- Arabian Pipes Co. (APCO AB) signed a SAR 107 mn contract with the local branch of CAT International Ltd., covering the manufacturing and supply of steel pipes for the Jafurah Phase III project. The nine-month contract is expected to impact the company's financial results in Q3 and Q4 of 2025. No related parties are involved. (Argaam)
- Saudi Research and Media Group's (RESEARCH AB) subsidiary, Taoq Public Relations Co., signed an annual SAR 252 mn contract with a commercial company in the publicity, advertising, and PR sector to provide media and marketing services. The three-year deal is expected to impact SRMG's financial statements starting Q1 2025. (Argaam)

- Tabuk Agricultural Development Co. (TAACO AB) extended a memorandum of understanding (MoU) with TOPIAN Ltd. (NEOM Food Co.) to plan, develop, construct, and operate a hydroponic greenhouse to produce fruits and vegetables for six months, starting April 17, 2025. (Argaam)
- Saudi Arabian Oil Co. (ARAMCO AB) signed memoranda of understanding (MoUs) and a cooperation agreement with consulting firms and educational institutions. The agreements aim to train Aramco employees through secondment and integration into consulting firms' projects. (Argaam)
- United Mining Industries Co.'s (UNITEDMI AB) board approved the company's transition to the Main Market, according to a statement to Tadawul. (Argaam)

Event Calendar

Date	Company	Event
15-Apr-25	TCC	Eligibility for Cash Dividend (SAR 0.25/sh)
15-Apr-25	ALJOUF	Eligibility for Cash Dividend (SAR 0.50/sh)
15-Apr-25	ALANDULUS	Eligibility for Cash Dividend (SAR 0.25/sh)
15-Apr-25	FUTURE VISION FOR HEALTH TRAINING	Final Allocation Date
15-Apr-25	FAKEEH CARE	Ordinary General Meeting
15-Apr-25	QACCO	Cash Dividend Distribution (SAR 0.80/sh)
15-Apr-25	SNB	Extraordinary General Meeting
15-Apr-25	FIRST AVENUE	Conference Call with Analysts and Investors

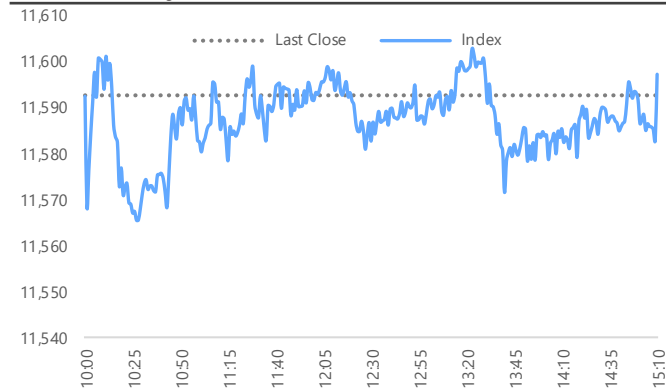
Source: Argaam, Bloomberg

Economic Calendar

Date	Event	Prior	Estimation
15-Apr-25	Saudi Arabia CPI YoY	2.0%	-
15-Apr-25	US Import Price Index YoY	2.0%	1.4%
15-Apr-25	US Export Price Index YoY	2.1%	-

Source: Argaam, Bloomberg

TASI Intraday Performance



Top Performers – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Media & Ent.	21,333.8	4.0%	-2.7%	-33.2%
Consumer Services	4,409.8	2.2%	-2.4%	-9.0%
Capital Goods	14,019.8	2.0%	1.7%	-7.6%
Software & Svc.	75,312.4	1.8%	0.9%	-7.7%
Comm. & Prof. Svc	4,822.1	1.6%	-2.2%	-1.6%

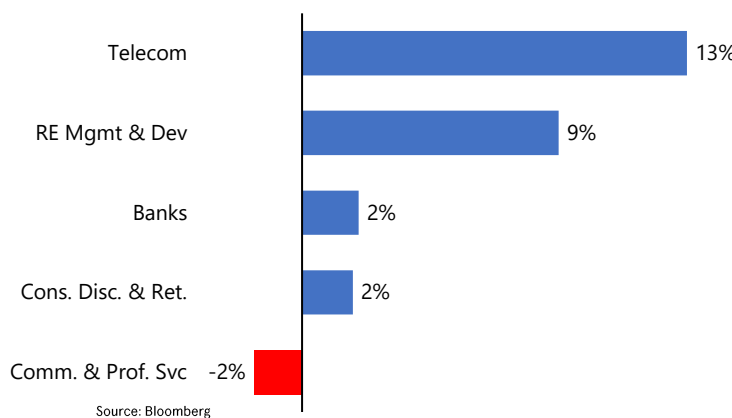
Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Allied Coop Insurance	16.1	10.0%	2.2	34.2
Red Sea International	44.8	10.0%	1.3	57.2
Electrical Industries	7.0	9.9%	24.2	166.3
Miahona Co.	22.6	9.9%	4.6	102.2
Saudi Manpower Solut.	6.4	8.1%	7.2	44.7

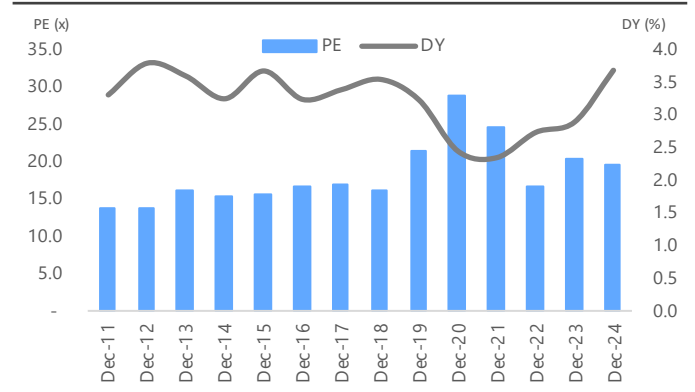
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Al Rajhi Bank	97.1	-0.9%	3.5	335.9
Americana Res. Int PLC	2.2	8.0%	111.4	233.7
Nice One	37.7	4.6%	5.9	218.0
Umm Al Qura	22.8	-0.4%	8.4	190.8
Aramco	26.0	0.2%	7.3	189.2

Top Performers – Sectors YTD Performance



Historical Tadawul PE and DY



Top Laggards – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Household & Personal	4,192.0	-1.1%	-12.0%	-16.8%
Banks	12,500.0	-0.9%	-5.3%	1.9%
Food & Beverages	5,512.3	-0.6%	-2.9%	-8.3%
Healthcare	11,317.7	-0.5%	0.1%	-3.7%
Transportation	6,070.8	-0.4%	-5.2%	-14.1%

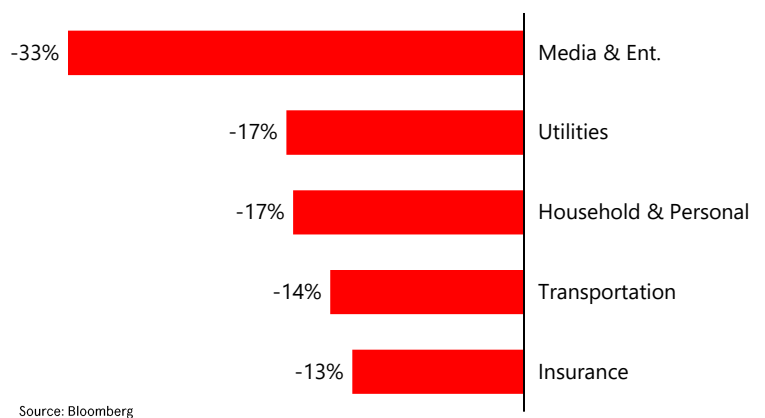
Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Riyad Bank	30.5	-5.3%	5.7	177.0
Raoom Trading Co.	86.5	-3.2%	0.1	8.1
Astra Industrial Group	153.8	-2.9%	0.2	34.4
Budget	78.1	-2.4%	0.2	13.7
Al-Babtain Power	43.5	-2.4%	1.0	44.1

Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Americana Res. Int PLC	2.2	8.0%	111.4	233.7
Tourism Enterprise	0.8	2.5%	25.5	21.1
Electrical Industries	7.0	9.9%	24.2	166.3
Batic Investments	2.4	3.0%	16.1	38.5
Al-Baha Invt. & Dev.	3.4	-0.9%	13.3	45.0

Top Laggards – Sectors YTD Performance



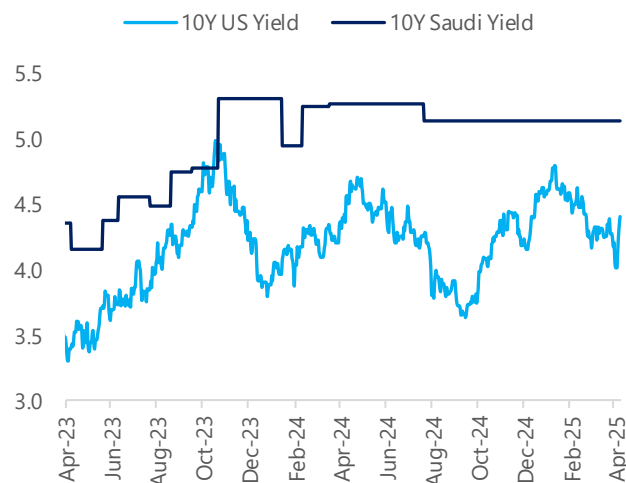
International Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
MSCI (World)	3,514.2	1.2%	18.0	-5.2%
MSCI (EM)	1,060.2	1.4%	11.8	-1.4%
US (S&P500)	5,406.0	0.8%	20.3	-8.1%
Nasdaq (CCMP Index)	16,831.5	0.6%	24.9	-12.8%
UK (FTSE 100)	8,134.3	2.1%	11.9	-0.5%
EURO (STOXX 600)	499.9	2.7%	13.6	-1.5%
GER (DAX)	20,954.8	2.9%	14.5	5.3%
JAP (NIKKEI 225)	33,982.4	1.2%	17.1	-14.8%
CHN (SHCOMP)	3,262.8	0.8%	14.1	-2.7%
Hong Kong (HSI)	21,417.4	2.4%	9.7	6.8%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	61.5	0.0%	-13.9%	-14.2%
Brent (USD/bbl)	64.9	0.2%	-13.2%	-13.1%
US Natural Gas (USD/mmbtu)	3.3	-5.7%	-19.3%	-8.5%
Gold (USD/oz)	3,210.9	-0.8%	2.8%	22.3%
Silver (USD/oz)	32.3	0.1%	-5.1%	11.9%
Naphtha (USD/ton)	541.0	0.6%	-11.3%	-11.5%
Ethylene (USD/ton)	895.0	0.0%	-3.2%	-3.2%
Urea (USD/ton)	375.0	0.0%	-1.7%	3.4%
Sugar (USD/ton)	17.9	-0.7%	-5.2%	-7.2%
Wheat (USD/ton)	547.5	-1.5%	2.0%	-0.7%
Cotton (USD/lb)	65.4	-2.5%	-3.9%	-7.3%
Aluminum (USD/ton)	2,374.0	-0.9%	-6.3%	-7.0%

Bond Yield Rates (%)



Source: Bloomberg

*Forward P/E (x): Based on earnings estimation for current year.

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Regional Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,597.4	0.0%	14.9	-3.6%
Dubai (DFM)	5,056.3	1.8%	8.5	-2.0%
Abu Dhabi (ADX)	9,236.8	0.9%	12.0	-1.9%
Kuwait (KSE)	8,356.6	-0.1%	15.0	6.6%
Qatar (QE)	10,146.7	0.3%	11.0	-4.0%
Oman (MSM)	4,276.2	0.0%	8.6	-6.6%
Bahrain (BHBX)	1,904.1	0.1%	6.9	-4.1%
Egypt (EGX)	12,353.7	0.5%	22.9	10.1%
Lebanon (BSX)	2,133.6	-0.0%	N/A	-18.8%
Morocco (MASI)	16,579.8	3.2%	21.7	12.2%

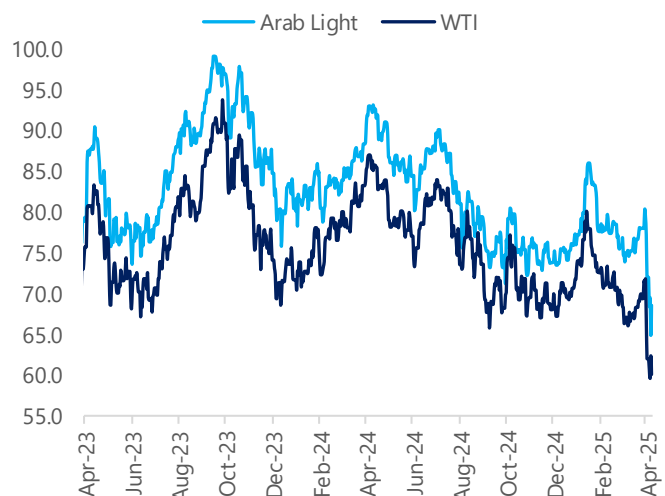
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.47	20 bps	(2) bps	(7) bps
KSA SAIBOR 6M	5.37	4 bps	(7) bps	(9) bps
SOFR 3M	4.36	0 bps	1 bps	(33) bps
SOFR 6M	4.51	(1) bps	(4) bps	(52) bps

Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	-0.0%	0.0%	-0.1%
GBP	0.76	-0.8%	-2.1%	-5.1%
EUR	0.88	0.0%	-4.7%	-8.8%
JPY	143.06	-0.3%	-4.6%	-9.0%
CHF	0.81	0.0%	-7.8%	-10.2%
CNY	7.31	0.2%	0.7%	0.1%

Global Oil Price (USD/bbl)



Source: Bloomberg