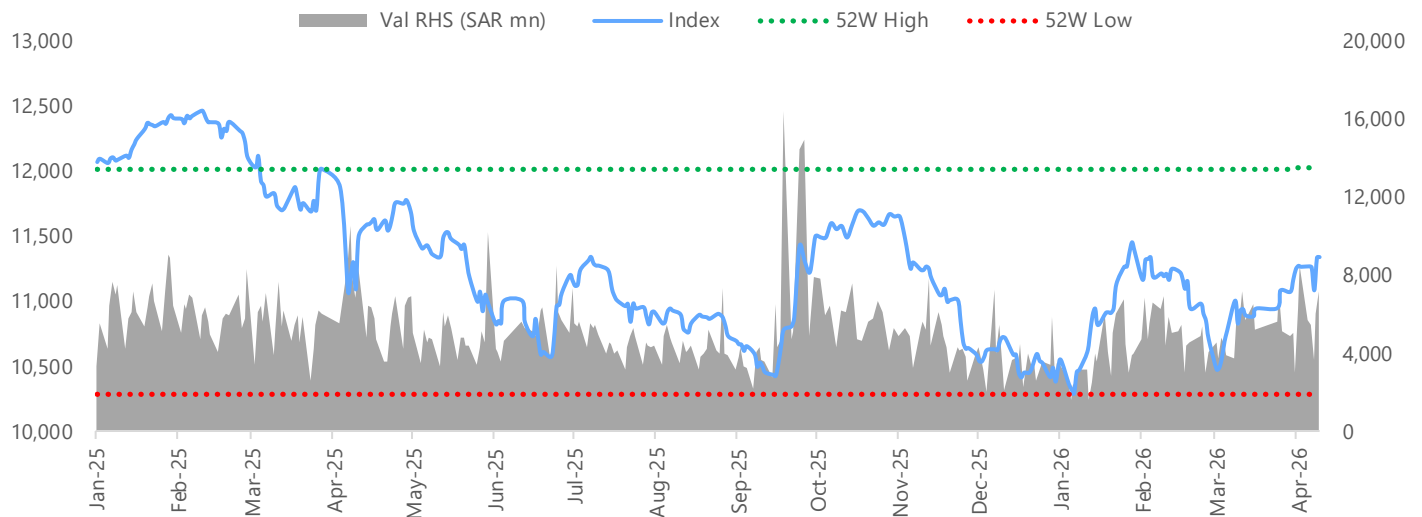


# Daily Market Watch

Sunday, April 12, 2026

Main Market TASI						Nomu Market											
Last Close			Value Traded (SAR bn)			Index Performance			Last Close			Value Traded (SAR mn)			Index Performance		
▲ 11,343.17			▼ 5.4			▲ 8.1% YTD			▲ 22,671.39			▼ 21.9			▼ -2.7% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
0.0%	0.8%	8.1%	-36.0%	28.3%	-10.8%	2.2%	3.4%	13.3%	0.2%	-0.1%	-2.7%	-17.3%	-19.5%	-32.1%	-20.1%	13.0%	-3.2%

## TASI Performance



## Markets Performance/News

- US stocks closed mixed on Friday, with investors keeping an eye on ongoing Middle East peace negotiations, while the US inflation report showed consumer price growth accelerated as expected, due to price pressures arising from the war on Iran. The Dow Jones and S&P 500 ended lower by 0.6% and 0.1%, respectively, while tech stocks boosted Nasdaq up 0.4%. Asian markets rose with Nikkei 225 climbing 1.8%, while CSI 300 and Hang Seng increased 1.5% and 0.5%, respectively. (Reuters)
- TASI remained flat, increasing 4.2 points, to close at 11,343.17. Trading value declined by 36.0% compared to the previous session. The Household & Personal Products sector was the top gainer, rising 2.5%. Among top performers, Alwasail Industrial Co. (ALWASAIL AB) rose 5.2%, followed by Rabigh Refining and Petrochemical Co. (PETROR AB) with a 4.3% uptick, while Gulf Union Alahlia Cooperative Insurance Co. (GULFUNI AB) increased 3.9%. (Tadawul)

## Major Economic/Sector News

- The World Bank downwardly revised its expectations for Saudi Arabia GDP growth by 1.2% to 3.1% in 2026 amid the ongoing US-Iran conflict. The bank said the slowdown in Saudi growth is less pronounced than in its GCC peers, reflecting steady expansion in non-oil sectors and the ability to reroute exports away from the Strait of Hormuz. (Argaam)
- The Industrial Production Index in Saudi Arabia recorded an increase of 8.9% during the month of February 2026 compared to the same month of the previous year. This was driven by growth in mining and quarrying, manufacturing, and water supply, as well as sewerage, waste management, and remediation activities. (Zawya)

## Major Corporate News

### Result Announcements

Company	TASI Code	Bloomberg Code	Net Profit (SAR mn)		Change YoY		Consensus	Variance
			1Q26	1Q25	SAR mn	%	SAR mn	%
ADVANCED PETROCHEMICAL	2330	APPC AB	30.0	72.0	-42.0	-58.3	13.5	122.6

Source: Tadawul, Bloomberg

- Basma Adeem Medical Co. (SMILECAR AB) signed a non-binding MoU with Al-Ajaji Trading Co. to acquire a 100% stake in Fahad Abdullah Al-Ajaji Dental Complex Co., a limited liability firm specialized in dental and dermatology clinics. The move is part of the company's strategy to expand its healthcare network and strengthen its presence in the dental and dermatology sectors. The MoU is valid for six months from the date of signing, renewable by mutual agreement, and there is no financial impact at present. (Argaam)
- Modern Mills Co. (MODERNMI AB) signed a SAR 16.9 mn agreement to purchase soybean meal from Al Ghurair Advanced Trading Co. The company said that the 3-month contract is expected to have a positive impact on the financial results for 2026. (Argaam)
- Batic Investments and Logistics Co. (BATIC AB) said that the total value of the deal concluded by its wholly owned subsidiary Saudi Transport and Investment Co. (Mubarrad), to purchase 90 MAN 20-ton truck heads (2026 model), amounted to SAR 39.1 mn (including VAT). (Argaam)
- ADES Holding Co. (ADES AB) announced the extension of the drilling contract for its premium jackup rig Shelf Drilling Scepter in Nigeria for a firm period of one-year, with a one-year unpriced option. The extension is in direct continuation of the rig's existing contract expiring in July 2026. The extension adds approximately SAR 178 mn (approx. USD 47.5 mn), from its firm period to the Group's backlog. (Tadawul)
- Al Khuzama Trading Co. (ALKUZAMA AB) announced the signing of a sale and purchase agreement to acquire (25%) ownership shares in Unique Food Catering Co. (LLC) amounting SAR 35 mn. The financial impact of this transaction is expected to appear after the transfer of ownership is completed and the results of the company's share are reflected in the financial statements. (Tadawul)
- Aldrees Petroleum and Transport Services Co. (ALDREES AB) opened a new station in Sabya Governorate, Jazan. The new station provides a full range of services, including shops, car services, ATMs, restaurants, and a mosque. It added that its station network now exceeds 1,300 locations. (Argaam)
- Riyadh Development Co. (ADCO AB) announces the completion of the transfer of the contributed asset (Al-Taamir Commercial Wholesale Center) to the sister company, Deera Development and Real Estate Investment Co., noting that there is no financial impact resulting from this procedure. (Tadawul)
- Saudi Arabian Airlines (Saudia) announced the partial resumption of its operations to and from Dubai, Abu Dhabi, and Amman through the operation of exceptional daily flights. This update is part of the operational measures Saudia is implementing to ensure the continuity of air services and facilitate travel while maintaining the highest standards of safety and quality. (Argaam)

---

#### Event Calendar

Date	Company	Event
12-Apr-26	The National Company for Glass Industries	Eligibility for Dividend (SAR 0.75/sh)
12-Apr-26	Al Hammadi Holding	Cash Dividend Distribution (SAR 0.20/sh)
12-Apr-26	Al Moammar Information Systems Co.	Cash Dividend Distribution (SAR 0.80/sh)
12-Apr-26	Dar Al Majed Real Estate Co.	Ordinary Assembly Meeting
12-Apr-26	Saudi Lime Industries Co.	Eligibility for Dividend (SAR 0.20/sh)

Source: Argaam, Bloomberg

---

#### Economic Calendar

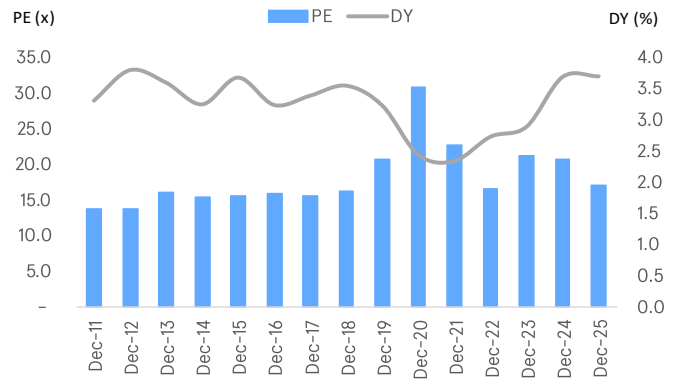
Date	Event	Prior	Estimation
13-Apr-26	US Existing Home Sales	4.1M	4.1M

Source: Argaam, Bloomberg, Investing.com

TASI Intraday Performance



Historical Tadawul PE and DY



Top Performers – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Household & Personal	5,593.9	2.5%	N/A	22.4%
Energy	5,188.5	0.8%	18.0	14.2%
Materials	5,629.7	0.5%	28.2	13.9%
Telecom	8,845.7	0.5%	14.5	0.9%
Capital Goods	16,594.6	0.2%	16.3	11.1%

Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Media & Ent.	12,155.9	-3.0%	52.9	-25.0%
Healthcare	9,911.5	-1.6%	23.9	0.4%
Consumer Dura & App.	3,521.2	-1.5%	N/A	-0.4%
Utilities	7,040.5	-1.0%	19.0	-3.3%
Financial Services	5,158.1	-1.0%	22.6	-4.6%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Alwasail Industrial Co.	2.8	5.2%	5.2	14.4
Petro Rabigh	10.6	4.3%	9.9	104.5
Gulf Union Alahlia	11.7	3.9%	0.5	5.7
Al Yamamah Steel	38.1	3.5%	0.6	21.5
Electrical Industries	17.3	3.3%	9.9	170.1

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
SRMG	81.6	-4.1%	0.2	14.0
SACO	24.6	-3.9%	0.4	9.1
Naseej Inter. Trading	23.7	-3.7%	0.2	5.0
SIDC	11.4	-3.6%	2.5	30.2
Saudi Vitrified C Pipes	18.3	-3.5%	0.2	3.5

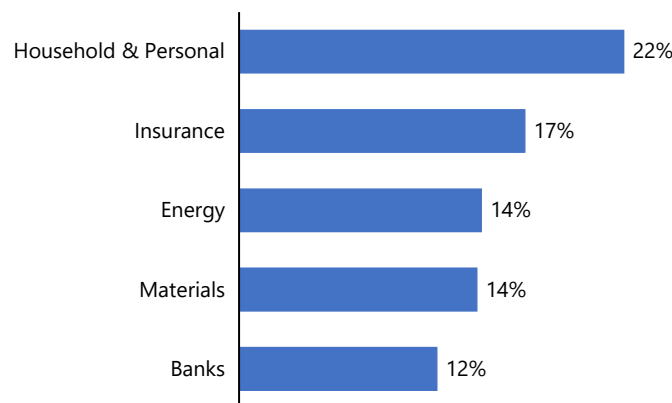
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Aramco	27.2	0.8%	15.6	422.5
Al Rajhi Bank	107.9	0.2%	3.3	351.8
SABIC Agri-Nutrients	151.5	2.0%	1.4	213.8
Saudi National Bank	42.9	-0.5%	4.3	182.2
Electrical Industries	17.3	3.3%	9.9	170.1

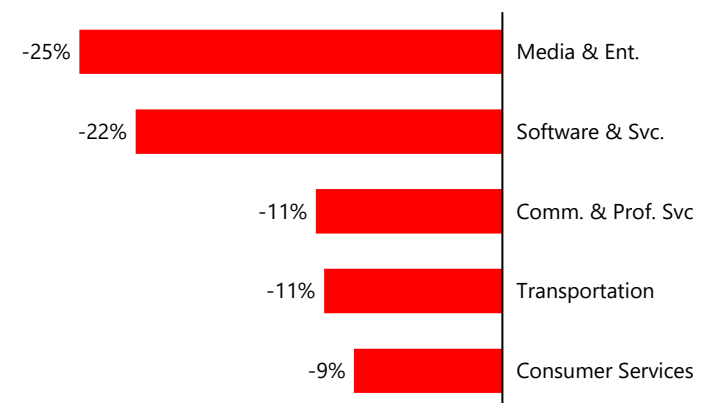
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Batic	2.3	0.5%	15.8	35.7
Aramco	27.2	0.8%	15.6	422.5
Americana Res. Int PLC	1.9	0.0%	15.5	29.2
Saudi Industrial Export	2.3	2.2%	13.3	30.9
Saudi Chemical	8.0	-2.0%	12.1	97.9

Top Performers – Sectors YTD Performance



Top Laggards – Sectors YTD Performance



Source: Bloomberg

Source: Bloomberg

\*Sourced from Bloomberg, based on earnings estimation for 2026.

**International Markets**

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
MSCI (World)	4,474.0	0.1%	19.5	1.0%
MSCI (EM)	1,547.5	1.2%	12.4	10.2%
US (S&P500)	6,816.9	-0.1%	21.0	-0.4%
Nasdaq (CCMP Index)	22,902.9	0.4%	25.3	-1.5%
UK (FTSE 100)	10,600.5	-0.0%	13.6	6.7%
EURO (STOXX 600)	614.8	0.4%	15.4	3.8%
GER (DAX)	23,804.0	-0.0%	15.6	-2.8%
JAP (NIKKEI 225)	56,924.1	1.8%	22.9	13.1%
CHN (SHCOMP)	3,986.2	0.5%	16.6	0.4%
Hong Kong (HSI)	25,893.5	0.5%	11.5	1.0%

**Commodity Price**

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	96.6	-1.3%	-4.7%	68.2%
Brent (USD/bbl)	95.2	-0.8%	-19.6%	56.5%
US Natural Gas (USD/mmbtu)	2.6	-0.8%	-8.2%	-28.2%
Gold (USD/oz)	4,749.8	-0.4%	1.7%	10.0%
Silver (USD/oz)	75.9	0.7%	0.9%	5.9%
Naphtha (USD/ton)	902.0	-1.8%	5.7%	78.6%
Ethylene (USD/ton)	1,505.0	0.0%	4.2%	106.2%
Urea (USD/ton)	835.0	7.4%	2.8%	112.7%
Sugar (USD/ton)	13.8	-1.2%	-11.4%	-8.4%
Wheat (USD/ton)	571.0	-0.6%	-7.3%	12.6%
Cotton (USD/lb)	73.2	-0.1%	4.6%	13.9%
Aluminum (USD/ton)	3,498.5	1.6%	0.9%	16.8%

**Regional Markets**

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,343.2	0.0%	15.5	8.1%
Dubai (DFM)	5,715.5	0.4%	9.9	-5.5%
Abu Dhabi (ADX)	9,838.4	0.0%	10.7	-1.5%
Kuwait (KSE)	9,214.1	-0.5%	13.8	-3.0%
Qatar (QE)	10,641.7	-0.2%	11.4	-1.1%
Oman (MSM)	8,162.8	-0.9%	13.7	39.1%
Bahrain (BHBX)	1,893.8	0.3%	6.2	-8.4%
Egypt (EGX)	18,187.7	0.2%	45.4	4.4%
Lebanon (BSX)	1,760.9	-1.5%	N/A	-10.4%
Morocco (MASI)	18,447.4	2.1%	N/A	-2.1%

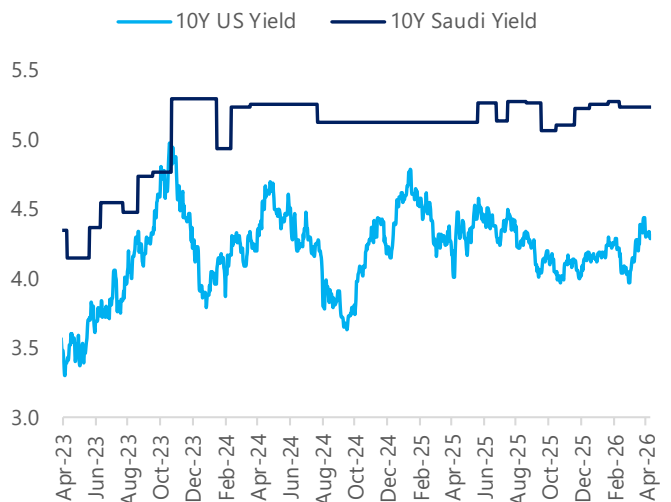
**Interest Rates**

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	4.76	(9) bps	(8) bps	(10) bps
KSA SAIBOR 6M	5.22	(3) bps	(5) bps	(1) bps
SOFR 3M	3.67	(0) bps	(1) bps	(34) bps
SOFR 6M	3.83	(0) bps	(3) bps	(37) bps

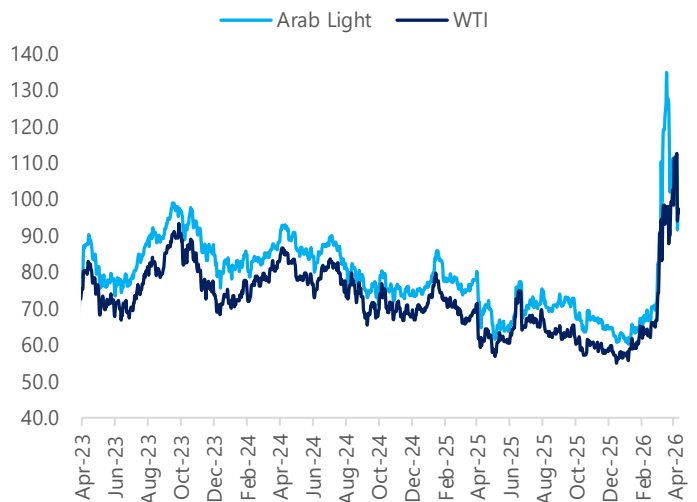
**Currency (Per USD)**

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	-0.0%	0.1%
GBP	0.74	-0.2%	-1.7%	0.1%
EUR	0.85	-0.2%	-1.5%	0.2%
JPY	159.27	0.2%	0.3%	1.6%
CHF	0.79	-0.2%	-1.4%	-0.5%
CNY	6.83	-0.0%	-0.9%	-2.3%

**Bond Yield Rates (%)**



**Global Oil Price (USD/bbl)**



\*Sourced from Bloomberg, based on earnings estimation for 2026.

For any feedback on our reports, please contact: [research@anbcapital.com.sa](mailto:research@anbcapital.com.sa)

**Disclaimer**

The document has been prepared by anb capital. The information contained in this document was obtained from several sources such as Bloomberg, Reuters, SAMA, IMF, IEA, OPEC, Tadawul, and other national and international agencies. anb capital have exerted their best efforts to acquire data and information from reliable sources. However, anb capital do not guarantee the accuracy of the data or information contained in this report. Therefore, anb capital make no representation, whether expressed or implied, concerning the accuracy and completeness of any information contained in this report. This report is not intended to provide personal investment advice, nor does it give any recommendations to buy or to sell any securities or any type of investment product. anb capital shall not be liable for any direct or indirect consequences resulting from the use of the information in this document. anb capital is a Saudi Closed Joint Stock Company with paid up capital of SAR 1,000 mn and is licensed by the Capital Market Authority of Saudi Arabia under license number 07072-37 and Unified Number 7001548267, with its head office at 3581 Al Mouyyad AL Jadid, Al Murabba, PO Box 220009, Riyadh 11311, Saudi Arabia, telephone number 800 124 0055.