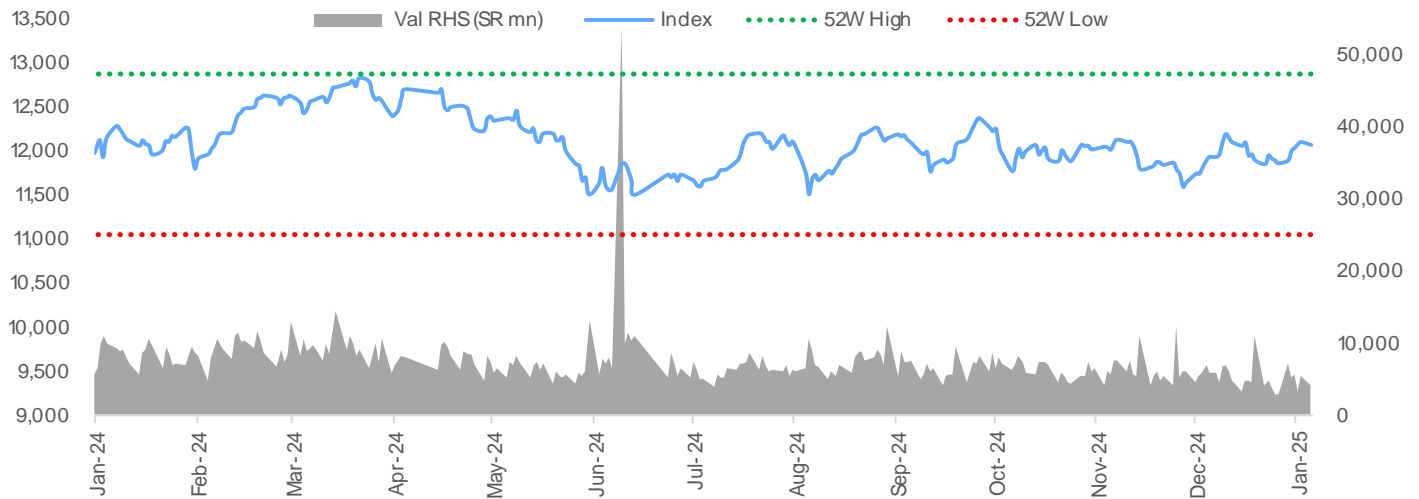


Daily Market Watch

Sunday, January 12, 2025

Main Market TASI						Nomu Market											
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▲ 12,097.8			▲ 7.5			▲ 0.5% YTD			▲ 31,027.4			▲ 74.4			▼ -1.4% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
0.1%	0.5%	0.5%	6.9%	-15.9%	-23.2%	-0.8%	4.6%	45.0%	0.8%	-1.4%	-1.4%	51.6%	75.8%	21.9%	25.3%	20.1%	369.4%

TASI Performance



Markets Performance/News

- The S&P 500 and NASDAQ both slipped on Friday, falling by 1.5% and 1.6%, respectively, wiping out early-year gains. The index recorded its worst decline since December 18, when the Federal Reserve spooked markets by signaling caution over the pace of rate reductions. This decline extended into Asian markets, with all regional indexes closing in the red. The CSI300, Hang Seng, and Nikkei 225 dropped by 1.3%, 0.9%, and 1.1%, respectively. (Bloomberg)
- TASI slightly rebounded on Thursday, rising by 0.1% or 9.0 points to close at 12,098. The Healthcare Equipment and Services sector experienced the largest increase, rising by 2.8%. Trading value also saw an uptick, increasing by 6.9% compared to the previous session. The best-performing stocks included Nice One Beauty Digital Marketing Co. (NICEONE AB), which gained 7.7%, Fawaz Abdulaziz Alhokair Co. (CENOMI AB) with a 6.5% rise, and Abdullah Saad Mohammed Abo Moati for Bookstores Co. (ABOMOATI AB), which rose by 4.4%. (Tadawul)

Major Economic/Sector News

- Mortgage contracts for housing support programs by the Real Estate Development Fund (REDF) grew by 15,000 (20%) in 2024, enabling 89,000 beneficiaries to secure loans totaling SAR 62.9 billion, compared to 74,000 beneficiaries in 2023. (Argaam)

Major Corporate News

- Saudi Tabreed District Cooling Co. is working with Citigroup Inc. and SNB Capital for a potential initial public offering (IPO) in Riyadh, Bloomberg reported, citing people familiar with the matter. The firm, backed by the Public Investment Fund (PIF), could go public as soon as this year. (Argaam)
- Al Moammar Information Systems Co. (MIS AB) signed a unified framework agreement with Saudi Aramco (ARAMCO AB) to supply Cisco IT system products based on agreed purchase orders. The contract value will be determined according to these orders, aligned with the pricing list in the agreement, which is valid for 120 months. (Argaam)
- Almunif Pipes Co. is preparing to finalize the paperwork required by the Capital Market Authority (CMA) for an initial public offering (IPO) on the Saudi Exchange (Tadawul) in Q2 2025, CEO Faisal Almunif told Argaam. (Argaam)
- Domestic flight prices in Saudi Arabia decreased by 7% in 2024 compared to the previous year, driven by increased competition and improved air connectivity, Muzzammil Ahussain, CEO of Almosafer Co., told Argaam. Additionally, local tourism in the country witnessed substantial growth, with travel rates rising by more than 40% between 2023 and 2024. (Argaam)

Event Calendar

Date	Company	Event
12-Jan-25	AICC	Extraordinary general meeting
12-Jan-25	IOUD	Extraordinary general meeting
12-Jan-25	ITMAM Consulting	Close of offering
13-Jan-25	ATAA	Eligibility for Cash Dividend (SAR 1.25/sh)
13-Jan-25	ATAA	Extraordinary general meeting
13-Jan-25	NAFIYAT	Cash Dividend Distribution (SAR 0.50/sh)
13-Jan-25	SMC	Listing Date
13-Jan-25	ALSHEHILI	Close of offering
13-Jan-25	BASMA ADEEM MEDICAL	Start of offering

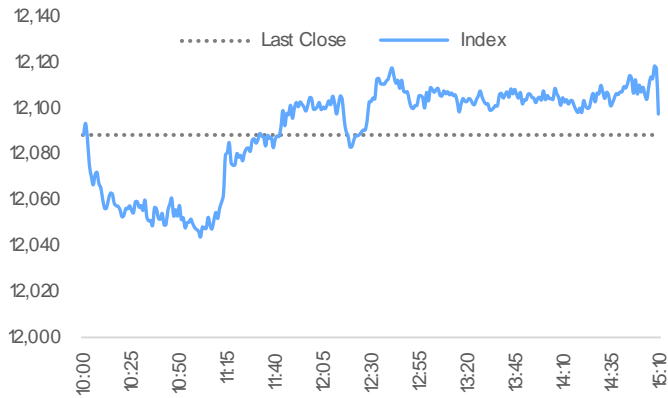
Source: Argaam, Bloomberg

Economic Calendar

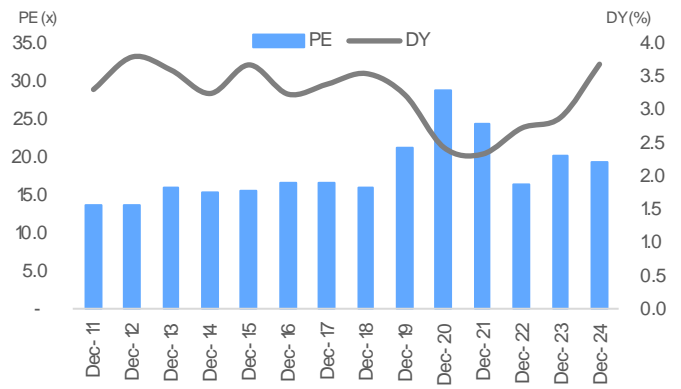
Date	Event	Prior	Estimation
13-Jan-25	US Federal Budget Balance	-\$366.8	-\$73.8
15-Jan-25	US CPI MoM	0.3%	0.3%
15-Jan-25	US CPI YoY	2.7%	2.9%
15-Jan-25	Saudi Arabia CPI YoY	2.0%	-

Source: Argaam, Bloomberg

TASI Intraday Performance



Historical Tadawul PE and DY



Top Performers – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Healthcare	12,332.7	2.8%	4.9%	4.9%
Comm. & Prof. Svc	5,441.8	0.7%	11.1%	11.1%
Banks	12,334.0	0.5%	0.6%	0.6%
Telecom	8,004.8	0.3%	1.7%	1.7%
Retailing	7,749.0	0.3%	3.0%	3.0%

Top Laggards – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Media	32,958.1	-2.0%	3.3%	3.3%
Household & Personal	5,635.4	-1.7%	11.8%	11.8%
Capital Goods	16,109.5	-1.0%	6.2%	6.2%
Utilities	13,596.0	-1.0%	-1.3%	-1.3%
Food & Beverages	5,941.4	-0.9%	-1.2%	-1.2%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Nice One	49.0	7.7%	32.0	1,578.3
Abdulaziz Alhokair	14.7	6.5%	3.6	50.9
A.Saad Moh A.Moati	35.5	4.4%	1.1	38.4
Arabian Pipes	12.7	4.1%	2.5	32.2
Sulaiman AH Medical	298.8	3.9%	0.5	135.2

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Salama Co. Insurance	19.5	-5.9%	1.2	24.4
Almoosa Health Co.	133.2	-5.1%	2.3	305.2
Shaker	28.3	-3.9%	0.4	10.3
Zamil Industrial	36.2	-3.7%	0.5	17.6
Ataa Educational	74.0	-3.7%	0.1	4.8

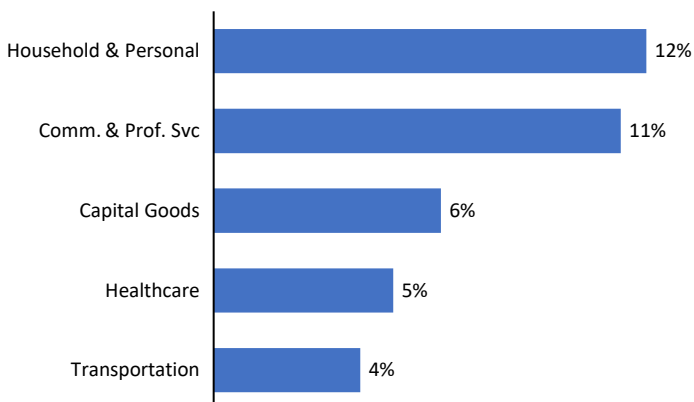
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Nice One	49.0	7.7%	32.0	1,578.3
Almoosa Health Co.	133.2	-5.1%	2.3	305.2
Al Rajhi Bank	95.8	0.0%	2.7	261.0
CATRION Catering	136.0	3.5%	1.7	235.8
Saudi National Bank	33.6	0.2%	5.7	189.8

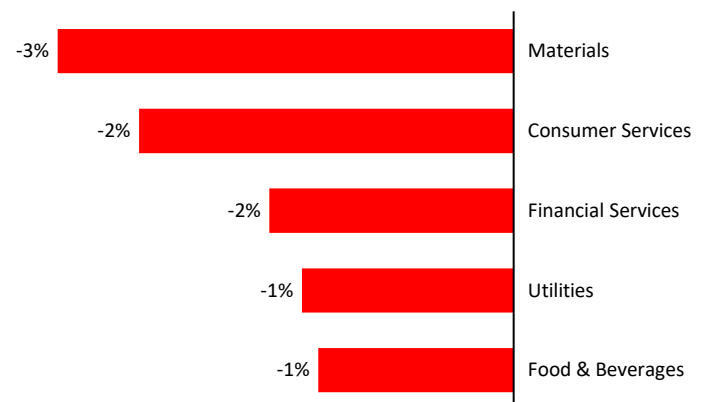
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Al-Baha Invt. & Dev.	0.5	-2.2%	92.6	41.5
Nice One	49.0	7.7%	32.0	1,578.3
Americana Res. Int PLC	2.2	1.4%	13.9	30.4
Batic Investments &	3.9	2.1%	13.6	52.7
Tourism Enterprise	0.9	0.0%	11.7	11.1

Top Performers – Sectors YTD Performance



Top Laggards – Sectors YTD Performance



Source: Bloomberg

Source: Bloomberg

International Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
MSCI (World)	3,678.2	-1.4%	-0.8%	-0.8%
MSCI (EM)	1,057.1	-0.9%	-1.7%	-1.7%
US (S&P500)	5,827.0	-1.5%	-0.9%	-0.9%
Nasdaq (CCMP Index)	19,161.6	-1.6%	-0.8%	-0.8%
UK (FTSE 100)	8,248.5	-0.9%	0.9%	0.9%
EURO (STOXX 600)	511.5	-0.8%	0.8%	0.8%
GER (DAX)	20,214.8	-0.5%	1.5%	1.5%
JAP (NIKKEI 225)	39,190.4	-1.0%	-1.8%	-1.8%
CHN (SHCOMP)	3,168.5	-1.3%	-5.5%	-5.5%
Hong Kong (HSI)	19,064.3	-0.9%	-5.0%	-5.0%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	76.6	3.6%	6.8%	6.8%
Brent (USD/bbl)	79.8	3.7%	6.9%	6.9%
US Natural Gas (USD/mmbtu)	4.0	7.8%	9.8%	9.8%
Gold (USD/oz)	2,689.8	0.8%	2.5%	2.5%
Silver (USD/oz)	30.4	0.9%	5.2%	5.2%
Naphtha (USD/ton)	647.5	1.9%	5.9%	5.9%
Ethylene (USD/ton)	925.0	0.0%	0.0%	0.0%
Urea (USD/ton)	352.5	0.0%	-2.8%	-2.8%
Sugar (USD/ton)	19.2	0.6%	-0.2%	-0.2%
Wheat (USD/ton)	530.8	-0.6%	-3.8%	-3.8%
Cotton (USD/lb)	67.0	-2.2%	-2.0%	-2.0%
Aluminum (USD/ton)	2,571.5	1.3%	0.8%	0.8%

Regional Markets

	Last Close	%Δ	MTD %Δ	YTD %Δ
Saudi (TASI)	12,097.8	0.1%	0.5%	0.5%
Dubai (DFM)	5,228.3	-0.0%	1.4%	1.4%
Abu Dhabi (ADX)	9,495.5	0.3%	0.8%	0.8%
Kuwait (KSE)	8,024.4	0.6%	2.4%	2.4%
Qatar (QE)	10,441.5	-0.1%	-1.2%	-1.2%
Oman (MSM)	4,597.9	0.0%	0.5%	0.5%
Bahrain (BHBX)	1,973.5	-0.2%	-0.6%	-0.6%
Egypt (EGX)	11,376.8	-0.3%	1.4%	1.4%
Lebanon (BSX)	2,702.7	7.1%	2.9%	2.9%
Morocco (MASI)	15,875.8	0.2%	7.5%	7.5%

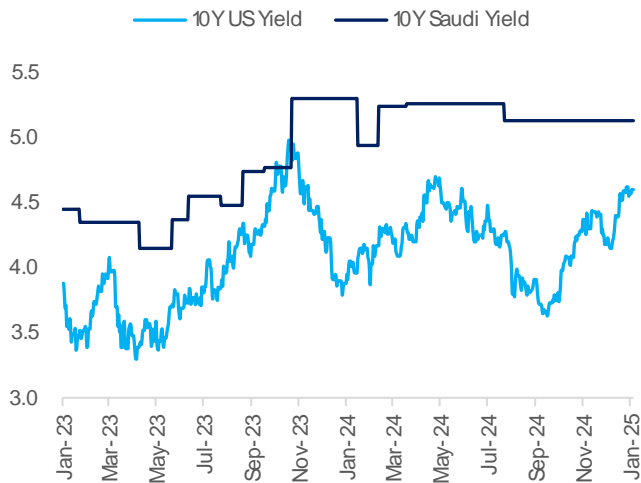
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.49	4 bps	(5) bps	(5) bps
KSA SAIBOR 6M	5.45	3 bps	(2) bps	(2) bps
SOFR 3M	4.64	(1) bps	(6) bps	(6) bps
SOFR 6M	4.97	(1) bps	(6) bps	(6) bps

Currency (Per USD)

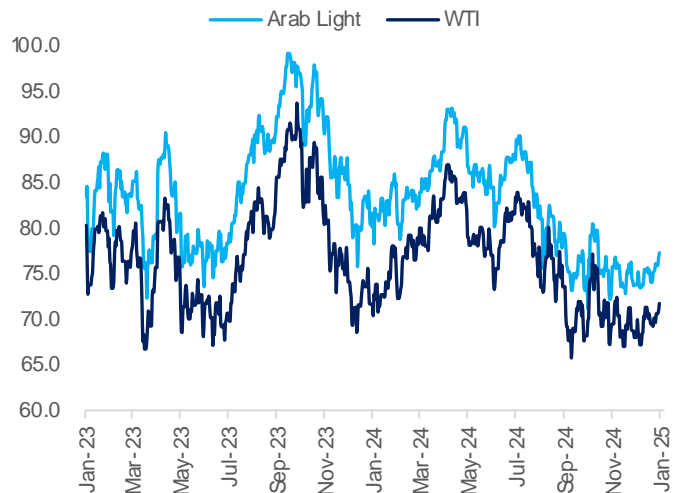
	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	-0.0%	-0.1%	-0.1%
GBP	0.81	0.4%	1.7%	1.7%
EUR	0.97	0.2%	0.5%	0.5%
JPY	158.14	-0.1%	0.6%	0.6%
CHF	0.91	0.1%	0.5%	0.5%
CNY	7.33	0.0%	0.4%	0.4%

Bond Yield Rates (%)



Source: Bloomberg

Global Oil Price (USD/bbl)



Source: Bloomberg

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