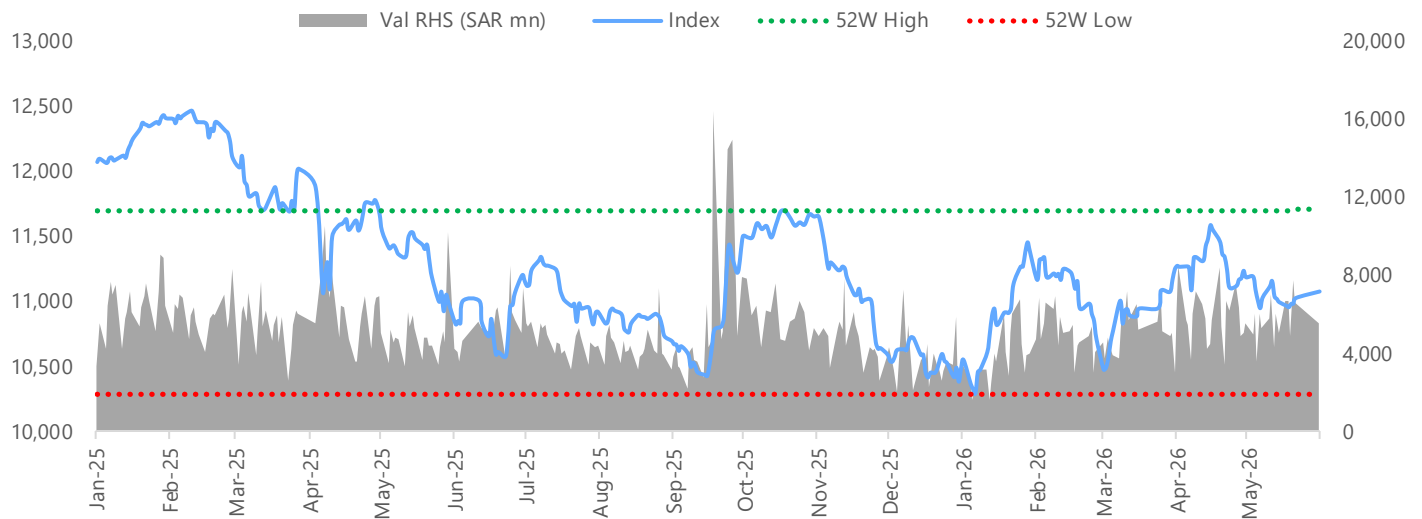


# Daily Market Watch

Monday, June 1, 2026

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▲ 11,077.91			▼ 4.0			▲ 5.6% YTD			▲ 22,931.51			▼ 17.6			▼ -1.6% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
0.5%	-1.0%	5.6%	-64.0%	38.3%	-2.4%	0.8%	0.6%	5.0%	0.1%	0.2%	-1.6%	-30.4%	63.5%	-23.7%	-14.5%	7.8%	-2.5%

## TASI Performance



## Markets Performance/News

- Asian equities began the Monday morning session on high note on the back of AI boost, while easing tensions in the Middle East further supported market sentiment. Hang Seng was up 0.8%, and Nikkie 225 increased 0.6%. While, MSCI Asia Pacific index rose 1.1%. (Reuters)
- TASI increase 0.5% (50.3 points) to close at 11,077.91. Trading value decreased by 64.0% compared to the previous session. The Consumer Services sector was top performer, rising 2.8%. Among the top performer, Saudi Industrial Development Co. (SIDC AB) and Kingdom Holding Co. (KINGDOM AB) gained 10.0% each followed by Al Masar Al Shamil Education Co. (ALMASARA AB) rose 7.6%. (Tadawul)

## Major Economic/Sector News

- Banks operating in Saudi Arabia reported a 6.1% rise in aggregate net profit before Zakat and tax to SAR 8.24 bn in April 2026, compared with SAR 7.77 bn a year earlier. Banks' aggregate assets increased 7.8% to SAR 5.08 tn in April. Further, deposits grew by nearly 10.5% to reach SAR 3.10 tn by the end of the same month. (Argaam)

## Major Corporate News

- Alramz Real Estate Co. (ALRAMZ AB) signed agreements to acquire the full shareholder units in Al Ahli Aleen Enbar Real Estate Fund, which owns "Qurtuba 2" project in Riyadh. Alramz currently owns 23% of the fund units, valued at SAR 40 mn. It will further acquire the remaining units for SAR 133 mn, bringing its total ownership to 100% of the fund's units. The transaction is expected to contribute positively to financial performance over 2026-2031. (Argaam)
- The Royal Commission for Makkah City and Holy Sites (RCMC) awarded six urban development sites in Makkah with a combined value of SAR 13.3 bn. (Argaam)
- Umm Al Qura for Development and Construction (MASAR AB) announces the receipt of two letters of award from the Royal Commission for Makkah City and Holy Sites to a consortium comprising Umm Al Qura for Development and Construction Co., Makkah Construction and Development Company (MCDCO AB), and Al Rajhi United Real Estate Company for the development of two sites. The project's initial estimated cost is around SAR 6 bn. (Tadawul)
- Al Sagr Cooperative Insurance Co. (SAGR AB) obtained the Insurance Authority's (IA) final approval to market and sell the health insurance for athletes, both individuals and groups. The insurance policy can be issued through sports clubs, federations, associations, or national teams and on an individual basis. (Argaam)

- Arabia Insurance Cooperative Co. (AICC AB) received the Insurance Authority's (IA) final approval to market and sell the "Tourist Policy" product for individual tourists in Saudi Arabia. The policy is designed for individual tourists visiting the Kingdom. (Argaam)
- Shalfa Facilities Management Co. (SHALFA AB) was awarded a project valued at SAR 35.93 mn with the Ministry of Interior. The project covers the operation, maintenance, and cleaning of the Unified Security Operations Center (911) building in Madinah. The project is valid for 36 months. (Argaam)
- Digital Research Co. (DRC AB) signed a framework agreement with a government entity for the provision of research and consulting services. The contractual value exceeds 30% of its total revenue for the year 2025 (~SAR 14 mn). The agreement is valid for three years. It is expected to have a positive financial impact on the company's financial statements starting from 2026. (Argaam)
- Saudi Arabian Refineries Co.'s (SARCO AB) subsidiary, Refineries Venture Company, signed a non-binding MoU with Khadra Al-Hijaz Environmental Services Company to acquire a 33% equity stake in Global Waste Solutions. SARCO expects this transaction to contribute positively to its financial results by the end of 4Q26. (Argaam)

### Event Calendar

Date	Company	Event
01-Jun-26	Jarir Marketing Co.	Eligibility for Cash Dividend (SAR 0.26/sh)
01-Jun-26	Saudi Energy Co.	Cash Dividend Distribution (SAR 0.70/sh)
01-Jun-26	Al Hammadi Holding	Eligibility for Cash Dividend (SAR 0.20/sh)
01-Jun-26	MOBI Industry Co.	Eligibility for Cash Dividend (SAR 0.15/sh)
01-Jun-26	Amlak International Finance Co.	Cash Dividend Distribution (SAR 0.50/sh)
01-Jun-26	ASG Plastic Factory Co.	Eligibility for Cash Dividend (SAR 0.30/sh)
01-Jun-26	Saudi Arabian Oil Co.	Eligibility for Cash Dividend (SAR 0.34/sh)
01-Jun-26	Arriyadh Development Co.	Cash Dividend Distribution (SAR 0.25/sh)

### Economic Calendar

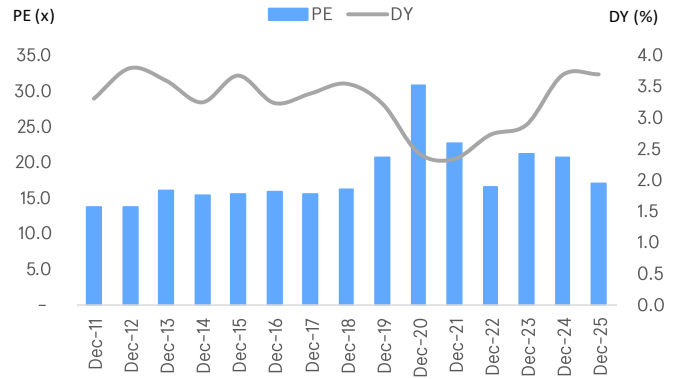
Date	Event	Prior	Estimation
01-Jun-26	US S&P Global Manufacturing PMI	54.5	55.3
01-Jun-26	US ISM Manufacturing PMI	52.7	53.3
01-Jun-26	US ISM Manufacturing Prices	84.6	85.3

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
Consumer Services	3,202.3	2.8%	23.6	-9.1%
Capital Goods	15,948.3	2.7%	15.5	6.8%
Insurance	9,025.5	2.2%	21.1	21.2%
Software & Svc.	55,335.2	2.2%	20.2	-4.8%
RE Mgmt & Dev	2,956.0	2.0%	15.3	2.7%

Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Energy	5,268.1	-1.3%	14.3	15.9%
Media & Ent.	10,982.5	-1.2%	46.2	-32.2%
Telecom	8,776.2	-0.3%	14.5	0.2%
REITs	3,037.5	-0.2%	N/A	4.0%
Food & Beverages	4,599.1	0.0%	16.8	5.8%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
SIDC	13.9	10.0%	1.5	20.4
Kingdom Holding	13.6	10.0%	0.6	7.4
ALMASAR ALSHAMIL	22.2	7.6%	1.0	20.9
DAR ALARKAN	18.0	7.2%	2.0	33.9
Electrical Industries	16.7	6.7%	3.5	58.2

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Cenomi Retail	12.6	-5.8%	1.6	20.4
PETRO RABIGH	15.1	-5.5%	7.2	108.5
Middle East Healthcare	32.4	-4.7%	1.2	38.0
Saudi Energy	16.2	-3.7%	1.8	29.9
SRMG	75.9	-3.0%	0.2	16.3

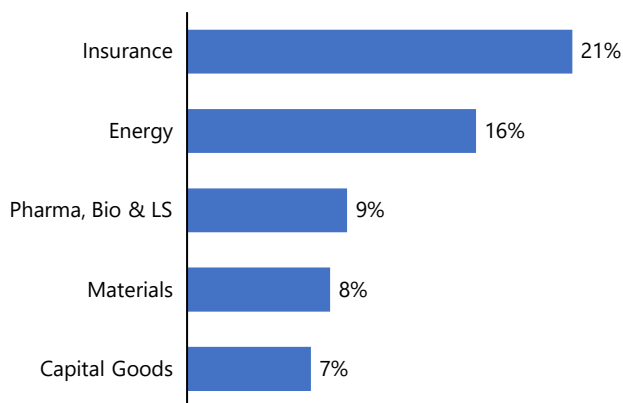
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Aramco	27.5	-1.3%	13.5	371.8
Al Rajhi Bank	67.3	1.0%	4.1	273.9
Dar Albalad	12.6	-2.1%	17.9	234.0
Saudi Basic	56.3	-1.6%	3.0	167.9
Saudi National Bank	39.5	0.3%	3.5	140.6

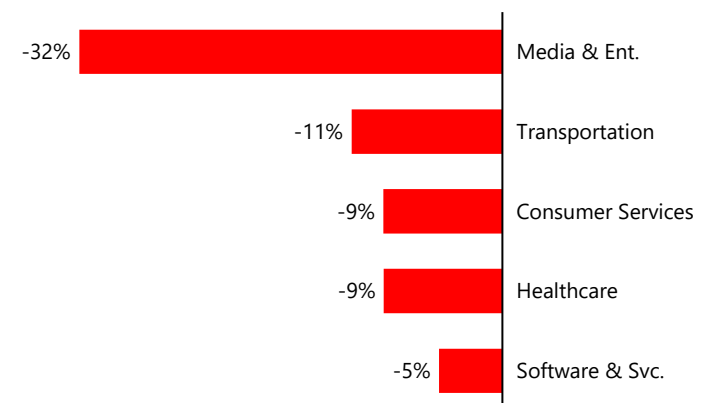
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Americana Res. Int PLC	1.9	1.0%	35.0	68.7
Dar Albalad	12.6	-2.1%	17.9	234.0
Aramco	27.5	-1.3%	13.5	371.8
Saudi Chemical	8.9	4.9%	10.4	90.8
PETRO RABIGH	15.1	-5.5%	7.2	108.5

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)	4,864.6	0.4%	20.5	9.8%
MSCI (EM)	1,752.2	1.6%	12.8	24.8%
US (S&P500)	7,580.1	0.2%	22.4	10.7%
Nasdaq (CCMP Index)	26,972.6	0.2%	29.2	16.1%
UK (FTSE 100)	10,409.3	-0.2%	13.1	4.8%
EURO (STOXX 600)	626.0	0.1%	15.5	5.7%
GER (DAX)	25,104.7	0.0%	16.1	2.5%
JAP (NIKKEI 225)	66,329.5	2.5%	23.8	31.8%
CHN (SHCOMP)	4,068.6	-0.7%	14.4	2.5%
Hong Kong (HSI)	25,182.4	0.7%	11.3	-1.7%

**Regional Markets**

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,077.9	0.5%	14.7	5.6%
Dubai (DFM)	5,757.5	1.1%	9.7	-4.8%
Abu Dhabi (ADX)	9,701.9	0.5%	10.8	-2.9%
Kuwait (KSE)	9,304.3	-0.7%	14.2	-2.0%
Qatar (QE)	10,555.0	-0.3%	12.0	-1.9%
Oman (MSM)	7,757.2	-0.2%	13.3	32.2%
Bahrain (BHBX)	1,979.1	0.9%	6.4	-4.2%
Egypt (EGX)	20,477.3	0.4%	53.9	17.5%
Lebanon (BSX)	1,748.0	-0.7%	N/A	-11.1%
Morocco (MASI)	18,875.0	0.0%	18.4	0.2%

**Commodity Price**

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	87.4	-1.7%	-16.9%	52.1%
Brent (USD/bbl)	92.1	-1.8%	-19.3%	51.3%
US Natural Gas (USD/mmbtu)	3.3	0.0%	18.9%	-10.7%
Gold (USD/oz)	4,540.3	1.0%	-1.7%	5.1%
Silver (USD/oz)	75.3	-0.4%	2.1%	5.1%
Naphtha (USD/ton)	873.7	-0.1%	-6.7%	73.0%
Ethylene (USD/ton)	1,175.0	0.0%	-17.0%	61.0%
Urea (USD/ton)	682.5	0.0%	-24.8%	73.9%
Sugar (USD/ton)	14.1	0.9%	-3.6%	-6.3%
Wheat (USD/ton)	610.5	-2.2%	-2.1%	20.4%
Cotton (USD/lb)	79.6	0.1%	-3.2%	19.1%
Aluminum (USD/ton)	3,666.5	0.2%	5.5%	22.4%

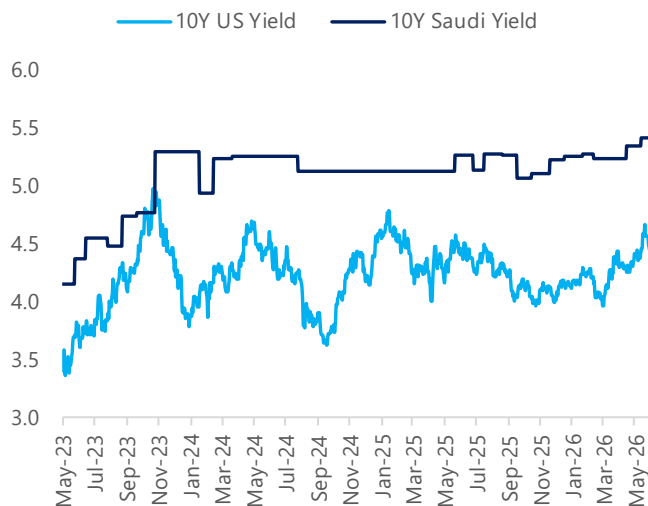
**Interest Rates**

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	4.90	21 bps	20 bps	4 bps
KSA SAIBOR 6M	5.19	(4) bps	(8) bps	(4) bps
SOFR 3M	3.64	(0) bps	(3) bps	(37) bps
SOFR 6M	3.70	(0) bps	(7) bps	(50) bps

**Currency (Per USD)**

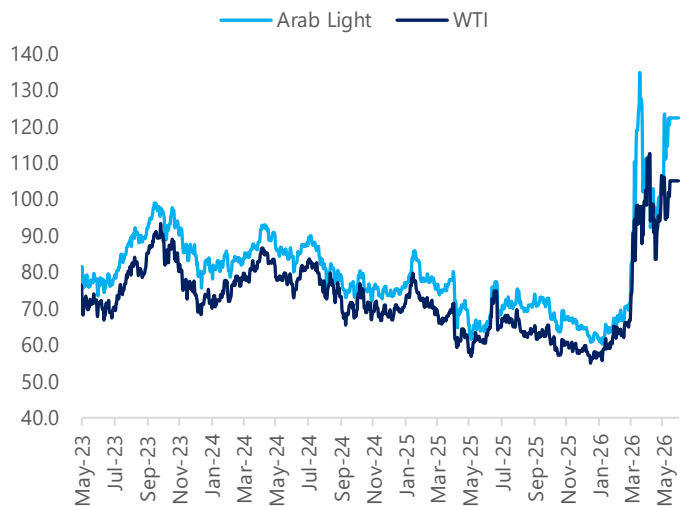
	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	0.1%	0.1%
GBP	0.74	-0.1%	1.1%	0.1%
EUR	0.86	-0.1%	0.6%	0.7%
JPY	159.27	0.0%	1.7%	1.6%
CHF	0.78	-0.4%	-0.1%	-1.5%
CNY	6.77	-0.1%	-0.9%	-3.2%

**Bond Yield Rates (%)**



Source: Bloomberg

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



Source: Bloomberg

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

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