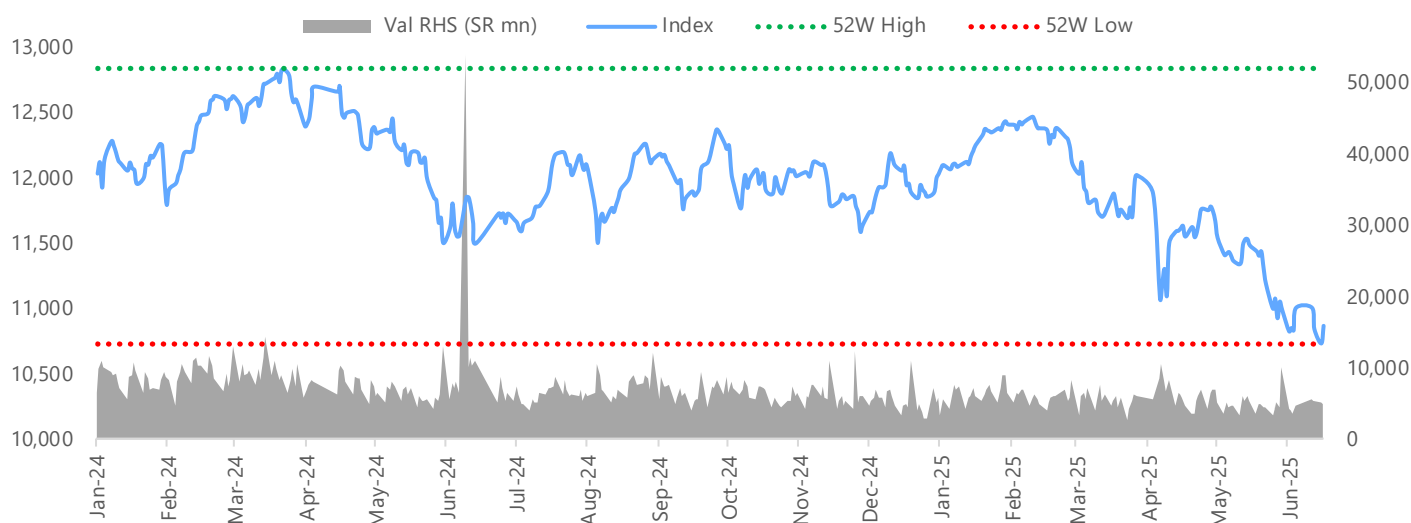


## Daily Market Watch

Tuesday, June 17, 2025

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▲ 10,867.0			▼ 4.9			▼ -9.7% YTD			▲ 26,672.6			▲ 46.8			▼ -15.3% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
1.3%	-1.1%	-9.7%	-5.4%	-8.6%	-13.2%	-5.5%	-8.1%	48.7%	1.0%	-0.5%	-15.3%	18.5%	-26.5%	-32.7%	-0.3%	24.0%	190.7%

### TASI Performance



### Markets Performance/News

- Relative calm returned to Wall Street, with stocks climbing as fears subsided that regional conflict would escalate into a wider war. Nasdaq and S&P 500 ended up by 1.5% and 0.9%, respectively. However, Asian markets opened mixed on Tuesday after President Donald Trump called for the evacuation of Tehran. Nikkei 225 was up by 0.6% while CSI300 and Hang Seng were down by 0.2% and 0.1%, respectively. (Bloomberg)
- TASI recorded an increase of 1.3% (135.5 points), closing at 10,867. Trading value experienced a decline of 5.4% compared to the previous session. The Utilities sector witnessed the most significant surge, expanding 5.5%. Among the top performers, Red Sea International Co. (REDSEA AB), CHUBB Arabia Cooperative Insurance Co. (ACE AB), and National Gypsum Co. (NGCO AB) rose 10.0%. (Tadawul)

### Major Corporate News

- Saudi Tadawul has announced the listing and start of trading of flynas shares on the Main Market under the symbol 4264, effective Wednesday, June 18, 2025. (Argaam)
- Riyadh Air, signed an order with Airbus (AIR FP) for 50 A350-1000 aircraft, including a firm order for 25 aircrafts and options for an additional 25. (Argaam)
- Tabuk Agricultural Development Co. (TAACO AB) received the full amount of an operational financing loan totaling SAR 14.85 mn from the Agricultural Development Fund. (Argaam)
- ASAS Makeen Real Estate Development Co. (MAKEEN AB) signed a SAR 240 mn, 42-month agreement with the National Housing Co. (NHC) to develop parts of the Al-Mashriqia project in eastern Riyadh. The company expects the project to positively impact its financial results in Q4 2025. (Argaam)
- Rabigh Refining and Petrochemical Co. (PETROR AB) completed the periodic maintenance and the resumption of operations of the facilities and production units. The company said that the financial impact of this shutdown will appear in the financial results for Q2 2025. (Argaam)
- Saudi Electricity Co. (SECO AB) is seeking a SAR 3.75 bn (\$1 bn) loan to finance new projects, including the expansion of a power plant, Bloomberg reported citing sources. (Argaam)

- TeamOne Co., the financial advisor on the initial public offering (IPO) of Naf Company for Feed for Industry on the Nomu-Parallel Market, set the offer price at SAR 76 per share, according to a statement to Tadawul. The Capital Market Authority (CMA) approved, in March, Naf's application for direct listing on Nomu. The company plans to float 400,000 shares, representing 20% of its issued capital, according to Argaam's data. (Argaam)
- ASAS Makeen Real Estate Development Co. (MAKEEN AB) began trading on the Nomu-Parallel Market with shares priced at SAR 80 each. (Argaam)
- Al-Fakhera for Men's Tailoring Co. (ALFAKHER AB) shareholders rejected the approval of business and contracts and contracts executed during the fiscal year ended Dec. 31, 2024, between the company and Sulaiman Bin Hamad Al Yahya Real Estate and Contracting Co., during the ordinary general meeting (OGM). (Argaam)
- Abdullah Al Othaim Markets Co.'s (AOTHAIM AB) shareholders approved several business contracts worth SAR 918.8 mn concluded in 2024 and additional contracts expected to be finalized in 2025 during the ordinary general meeting (OGM). (Argaam)

## Event Calendar

Date	Company	Event
17-Jun-25	CENOMI CENTERS	Ordinary Assembly Meeting
17-Jun-25	ARABICA STAR	Ordinary Assembly Meeting
17-Jun-25	TIME	Listing Date
17-Jun-25	WSM	Ordinary Assembly Meeting
17-Jun-25	LUMI	Ordinary Assembly Meeting
17-Jun-25	MESC	Ordinary Assembly Meeting
17-Jun-25	ARABIAN MILLS	Cash Dividend Distribution (SAR 0.59/sh)
17-Jun-25	SURE	Eligibility for Cash Dividend (SAR 1.50/sh)
17-Jun-25	SURE	Ordinary Assembly Meeting
17-Jun-25	SASCO	Ordinary Assembly Meeting
17-Jun-25	UFG	Eligibility for Cash Dividend (SAR 1.00/sh)
17-Jun-25	UFG	Extraordinary General Meeting
17-Jun-25	CENOMI CENTERS	Ordinary Assembly Meeting

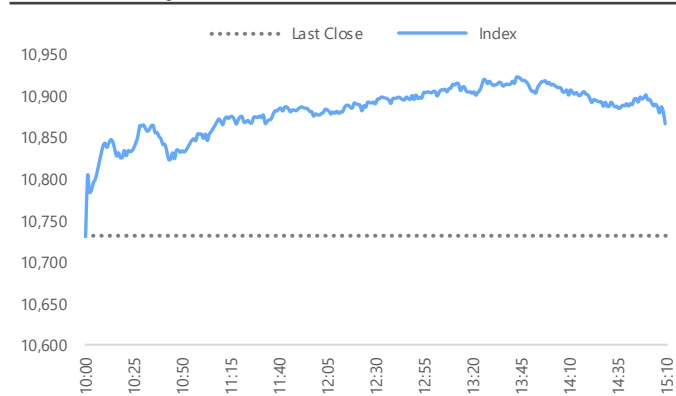
Source: Argaam, Bloomberg

## Economic Calendar

Date	Event	Prior	Estimation
17-Jun-25	US Core Retail Sales MoM	0.10%	0.20%
17-Jun-25	US Retail Sales MoM	0.10%	-0.60%
17-Jun-25	The API Report on the US Crude Oil Inventories - Weekly	-0.370 mn	-
18-Jun-25	Fed Interest Rate Decision	4.50%	4.50%

Source: Argaam, Bloomberg

### TASI Intraday Performance



### Top Performers – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Utilities	9,403.1	5.4%	14.3	-31.7%
Household & Personal	5,076.0	5.3%	N/A	0.7%
Capital Goods	14,022.9	4.1%	14.6	-7.6%
Comm. & Prof. Svc	4,466.8	2.8%	15.3	-8.8%
Insurance	8,876.4	2.5%	19.9	-16.4%

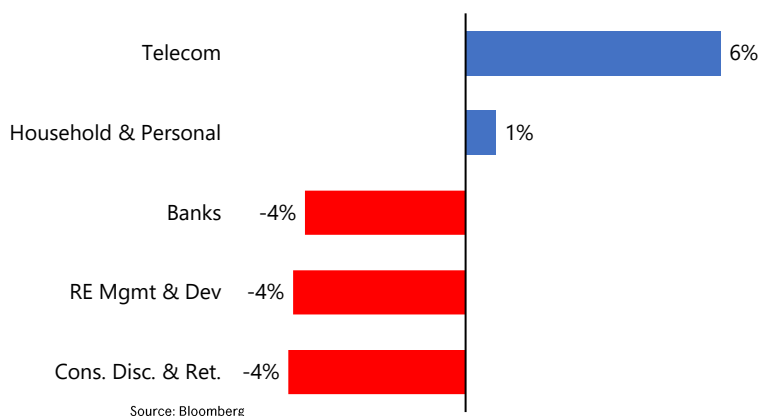
### Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Red Sea International	36.9	10.0%	0.8	29.6
CHUBB Arabia Ins	33.6	10.0%	0.2	6.7
National Gypsum Co	19.4	10.0%	0.4	7.0
Saudi Enaya Co-op Ins.	9.3	8.0%	0.3	2.3
ACWA Power	262.0	6.9%	0.8	195.9

### Value Leaders – Companies

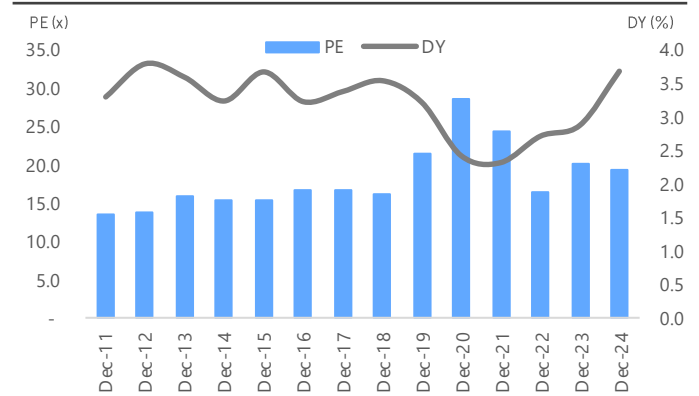
	Last Close	%Δ	Vol (mn)	Val (SR mn)
Aramco	25.3	-0.4%	14.7	372.3
Al Rajhi Bank	92.6	1.5%	3.7	338.0
ACWA Power	262.0	6.9%	0.8	195.9
Alinma Bank	25.2	-0.4%	6.5	165.5
SABIC Agri-Nutrients	103.8	5.2%	1.6	159.9

### Top Performers – Sectors YTD Performance



Source: Bloomberg

### Historical Tadawul PE and DY



### Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Healthcare	10,269.3	-0.8%	16.5	-12.6%
Energy	4,793.3	-0.3%	5.8	-9.6%
Software & Svc.	69,818.4	0.4%	15.6	-14.5%
REITs	2,954.6	0.5%	N/A	-6.9%
Banks	11,826.3	0.9%	10.4	-3.6%

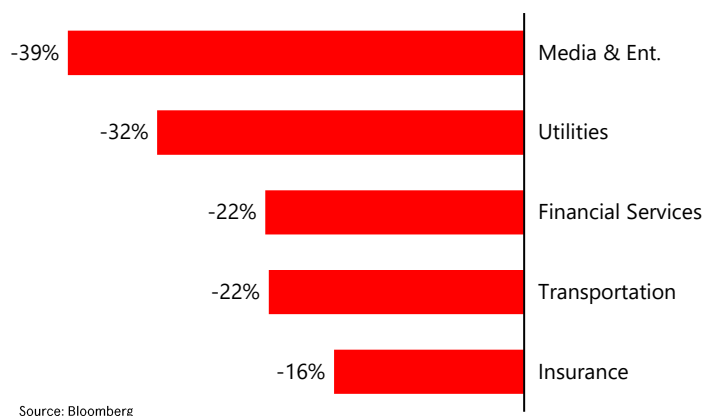
### Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
MBC Group	35.8	-3.1%	2.1	75.2
Sulaiman AH Medical	255.0	-2.3%	0.2	62.9
Gulf Union Alahlia Ins.	14.5	-1.6%	0.2	3.4
Middle East Cables	30.6	-1.1%	0.5	15.4
Fakeeh care	39.9	-0.8%	1.0	41.4

### Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Americana Res. Int PLC	2.1	2.0%	64.8	133.4
Aramco	25.3	-0.4%	14.7	372.3
Tourism Enterprise	0.8	1.4%	10.7	8.1
Al-Baha Invt. & Dev.	3.4	4.0%	10.4	34.8
Batic Investments	2.1	2.9%	8.4	17.8

### Top Laggards – Sectors YTD Performance



Source: Bloomberg

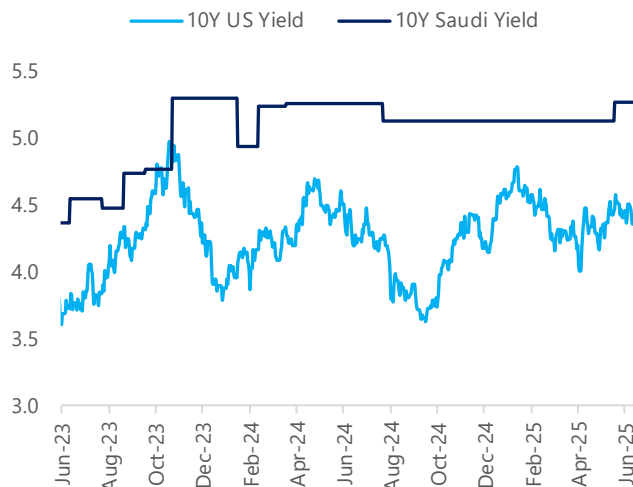
### International Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
MSCI (World)	3,936.0	0.9%	20.6	6.2%
MSCI (EM)	1,198.2	0.7%	13.2	11.4%
US (S&P500)	6,033.1	0.9%	23.3	2.6%
Nasdaq (CCMP Index)	19,701.2	1.5%	30.3	2.0%
UK (FTSE 100)	8,875.2	0.3%	13.7	8.6%
EURO (STOXX 600)	546.9	0.4%	15.3	7.7%
GER (DAX)	23,699.1	0.8%	16.7	19.0%
JAP (NIKKEI 225)	38,311.3	1.3%	18.8	-4.0%
CHN (SHCOMP)	3,388.7	0.3%	13.2	1.1%
Hong Kong (HSI)	24,061.0	0.7%	10.8	19.9%

### Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	71.8	-1.7%	18.1%	0.1%
Brent (USD/bbl)	73.2	-1.3%	14.6%	-1.9%
US Natural Gas (USD/mmbtu)	3.7	4.7%	8.7%	3.2%
Gold (USD/oz)	3,385.2	-1.4%	2.9%	29.0%
Silver (USD/oz)	36.3	0.0%	10.1%	25.6%
Naphtha (USD/ton)	568.9	-0.5%	4.4%	-7.0%
Ethylene (USD/ton)	855.0	0.0%	0.0%	-7.6%
Urea (USD/ton)	380.0	0.0%	0.0%	4.8%
Sugar (USD/ton)	16.5	2.4%	-3.1%	-14.2%
Wheat (USD/ton)	536.5	-1.3%	0.5%	-2.7%
Cotton (USD/lb)	68.0	0.3%	0.4%	-2.4%
Aluminum (USD/ton)	2,513.5	0.4%	2.8%	-1.5%

### Bond Yield Rates (%)



Source: Bloomberg

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

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.

### Regional Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	10,867.0	1.3%	14.3	-9.7%
Dubai (DFM)	5,407.0	0.8%	9.3	4.8%
Abu Dhabi (ADX)	9,584.9	0.2%	12.0	1.8%
Kuwait (KSE)	8,626.4	1.4%	17.7	10.0%
Qatar (QE)	10,464.8	1.7%	11.4	-1.0%
Oman (MSM)	4,535.2	0.7%	9.3	-0.9%
Bahrain (BHBX)	1,904.4	0.1%	10.9	-4.1%
Egypt (EGX)	12,511.4	0.9%	23.1	11.5%
Lebanon (BSX)	2,006.0	0.0%	N/A	-23.7%
Morocco (MASI)	18,178.6	-1.3%	19.7	23.1%

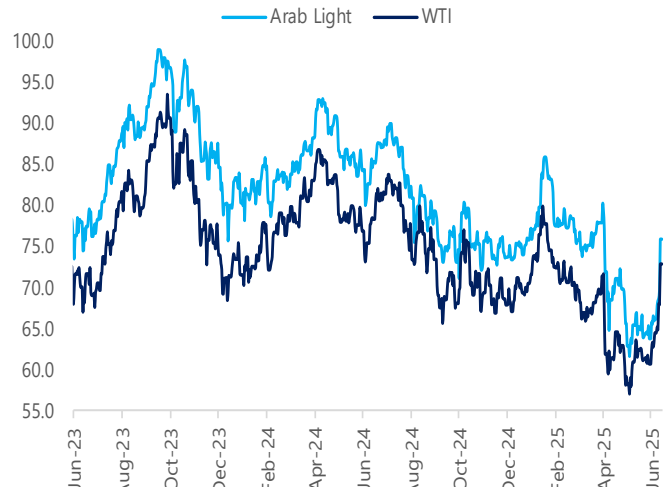
### Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.38	2 bps	(1) bps	(16) bps
KSA SAIBOR 6M	5.34	(1) bps	(13) bps	(12) bps
SOFR 3M	4.34	(0) bps	(1) bps	(35) bps
SOFR 6M	4.38	(1) bps	(3) bps	(65) bps

### Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	-0.0%	0.0%	-0.1%
GBP	0.74	-0.1%	-0.9%	-7.8%
EUR	0.87	-0.1%	-1.8%	-10.4%
JPY	144.75	0.5%	0.5%	-7.9%
CHF	0.81	0.3%	-1.0%	-10.3%
CNY	7.18	-0.0%	-0.3%	-1.6%

### Global Oil Price (USD/bbl)



Source: Bloomberg