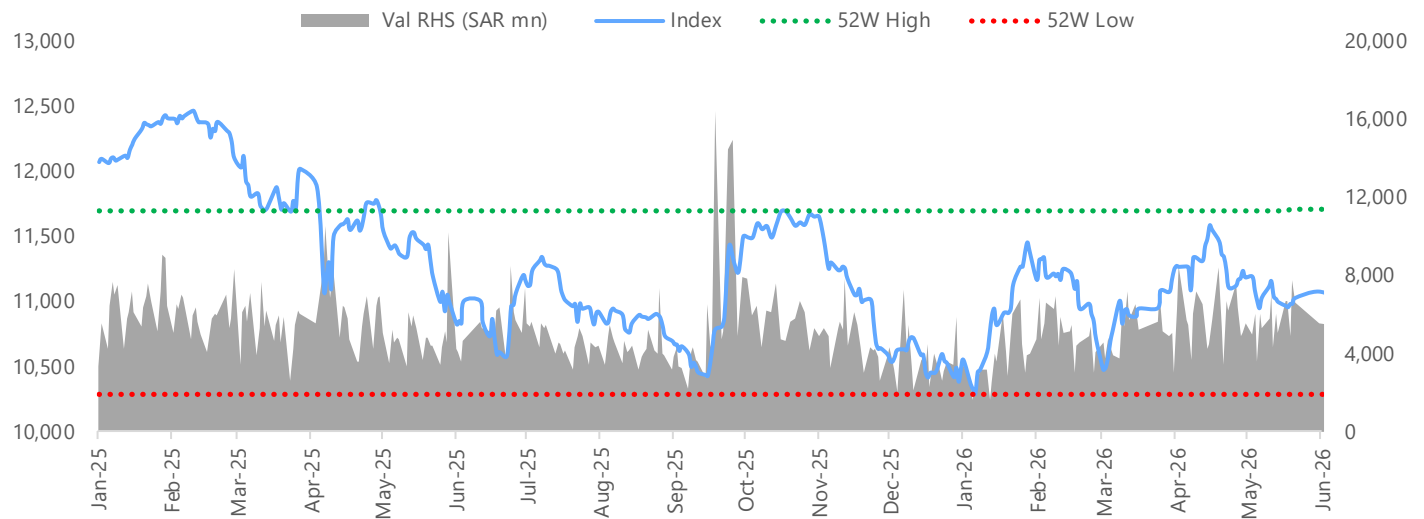


Daily Market Watch

Tuesday, June 2, 2026

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▼ 11,009.52			▲ 7.6			▲ 4.9% YTD			▲ 22,959.39			▲ 27.4			▼ -1.4% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
-0.6%	-0.6%	4.9%	91.3%	37.4%	-1.3%	1.7%	0.0%	3.9%	0.1%	0.1%	-1.4%	55.7%	64.1%	-23.4%	-13.9%	7.2%	-4.0%

TASI Performance



Markets Performance/News

- U.S. stocks posted modest gains on Monday as investors watched developments in U.S.-Iran peace negotiations and cheered the unveiling of a new computer chip that promises to bring artificial intelligence to personal computing. Nasdaq was up 0.4%, followed by S&P 500 which gained 0.3%. Dow Jones also increased 0.1%. Asian stocks were trading mixed on Tuesday morning, as doubts over the durability of a Middle East ceasefire blunted the boost from AI optimism. The Hang Seng index surged 1.4%, and CSI 300 up 0.7%. However, Nikkei 225 declined by 1.6%. (Reuters)
- TASI fell 0.6% (68.3 points) to close at 11,009.52, while trading value increased 91.3% compared to the previous session. The Food & Beverages sector was the top laggard, declining 1.6%. Among top laggards, Dallah Healthcare Co. (DALLAH AB) declined 5.2%, followed by SABIC Agri-Nutrients Co. (SAFCO AB), which fell 3.9%. Yanbu National Petrochemical Co. (YANSAB AB) also closed lower by 3.5%. (Tadawul)

Major Economic/Sector News

- Residential mortgages granted to individuals by banks in Saudi Arabia rose slightly by 0.5% YoY to SAR 6.33 bn in April 2026, marking the first increase following a series of nine consecutive declines. Compared to March, residential mortgage increased by approximately SAR 2.1 bn, or 51% MoM. This represents the highest level of new residential mortgage provided to individuals by banks in Saudi Arabia since July 2025, when it reached approximately SAR 6.42 bn. (Argaam)
- OPEC+ member nations are likely to approve an increase in the oil production ceiling for July. The expected increase in the July production ceiling is around 188,000 barrels per day (bpd). If the anticipated July increase is approved, the alliance will have unwound about 567,000 bpd of a 1.65 mn bpd voluntary production cut package agreed upon in 2023. (Argaam)

Major Corporate News

- Saudi Aramco (ARAMCO AB) has raised official selling prices for liquefied petroleum gas by between 1% and 3% in June. Saudi Aramco's June OSPs increased by USD 10 per metric ton to USD 760 a ton for propane and by USD 20 a ton to USD 820 per ton for butane. (Zawya)

- A consortium comprising Ladun Investment Co. (LADUN AB) and AL-AYUNI Investment and Contracting Co. won the Khalidiyah Informal Settlement Redevelopment Project in Makkah from the Royal Commission for Makkah City and Holy Sites (RCMC). The consortium will be owned equally between Ladun and Al-Ayuni Investment and Contracting Co., with a 50% stake each. Targeted sales from the project are expected to exceed SAR 6 bn. Ladun added the project would have a favorable impact on the earnings throughout the project period. (Argaam)
- Saudi Basic Industries Corporation (SABIC AB) has launched a public auction of industrial assets from its production facilities in La Aljorra in the Region of Murcia (Spain), specifically from the LX2 polycarbonate plant and the HPP plant following their permanent closure. The auction comprises a total of 141 lots divided into two specialised events. (Zawya)
- Axelerated Solutions for Information and Communication Technology Co. (AXELERAT AB) announced the signing of a preliminary Memorandum of Understanding with Al Wathiqa Al Masiya Closed Joint Stock Company (Diamond Insurance Broker) regarding the investment in the Shaheen Electronic Insurance Broker Platform. Axelerated Solutions intends to acquire a 30% ownership stake in the Shaheen Electronic Insurance Broker platform. The financial impact of the investment will be determined upon completion of the required procedures and execution of the relevant definitive agreements. (Tadawul)
- BinDawood Holding Co. (BINDAWOO AB) has completed the procedures for the acquisition of a 51% stake in Vaza Food Co., in a deal worth SAR 217.9 mn. The consideration will be paid as agreed in the Share Purchase Agreement (SPA). The transaction is expected to have a positive financial impact on the company and its shareholders in the long-term. (Argaam)
- Banan Real Estate Co.'s (BANAN AB) subsidiary, Qimam Nashaz Real Estate Development Co., signed a Shariah-compliant credit facility agreement worth SAR 84 mn from Riyadh Bank (RIBL AB). The financing consists of SAR 49 mn with a seven-year tenor and SAR 35 mn with an eight-year tenor. (Argaam)

Event Calendar

Date	Company	Event
02-Jun-26	Horizon Food Co.	Ordinary Assembly Meeting
02-Jun-26	Wataniya Insurance Co.	Ordinary Assembly Meeting
02-Jun-26	Academy of Learning Co.	Ordinary Assembly Meeting
02-Jun-26	Makkah Construction and Development Co.	Ordinary Assembly Meeting
02-Jun-26	Seera Group Holding	Extraordinary General Meeting (Capital Reduction to SAR 2.74 bn)
02-Jun-26	Al Moammar Information Systems Co.	Ordinary Assembly Meeting
02-Jun-26	Makkah Construction and Development Co.	Eligibility for Cash Dividend (SAR 1.50/sh)

Source: Argaam, Bloomberg

Economic Calendar

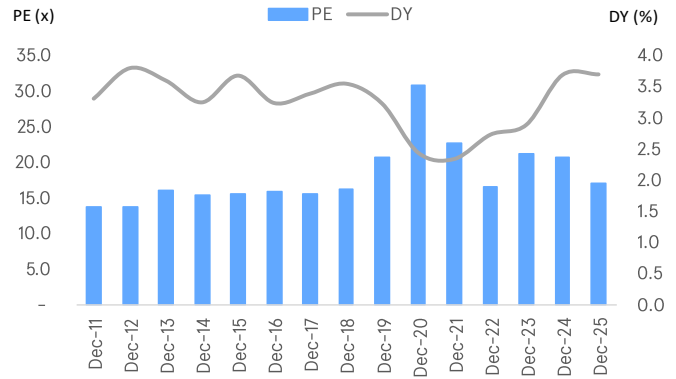
Date	Event	Prior	Estimation
02-Jun-26	US JOLTS Job Openings	6.9M	6.9M

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	4,889.5	3.8%	N/A	7.0%
Comm. & Prof. Svc	4,015.4	3.2%	15.6	-0.5%
Consumer Services	3,279.1	2.4%	24.1	-6.9%
Consumer Dura & App.	3,564.4	2.3%	N/A	0.8%
Media & Ent.	11,188.0	1.9%	47.1	-31.0%

Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Food & Beverages	4,526.1	-1.6%	16.5	4.1%
Utilities	7,505.4	-1.4%	22.3	3.0%
Healthcare	8,855.8	-1.3%	22.2	-10.3%
Pharma, Bio & LS	4,704.6	-1.1%	19.6	7.6%
Materials	5,280.4	-1.0%	27.2	6.8%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Jahez	14.4	10.0%	7.3	102.9
SIDC	15.3	9.9%	2.3	34.7
Kingdom Holding	14.9	9.9%	7.3	107.8
Anaam Int.	11.3	9.9%	1.0	11.4
SMASCO	6.3	6.6%	8.7	53.7

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Dallah Healthcare	105.4	-5.2%	0.4	38.9
SABIC Agri-Nutrients	132.6	-3.9%	0.9	115.1
YANSAB	32.6	-3.5%	1.0	31.1
Electrical Industries	16.1	-3.4%	8.3	132.8
Saudi Cable	145.0	-3.3%	0.2	25.7

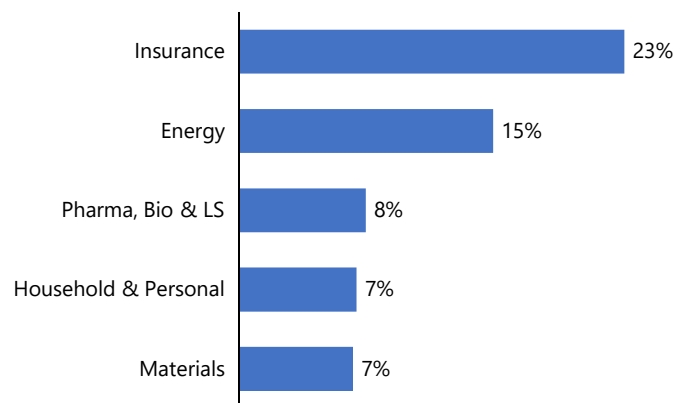
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Aramco	27.4	-0.7%	27.6	757.2
Al Rajhi Bank	66.7	-0.8%	9.4	626.1
Saudi National Bank	39.1	-0.9%	10.6	417.7
ACWA POWER Co.	186.0	-2.5%	1.9	369.8
Saudi Arabian Mining	63.0	-0.3%	2.8	175.4

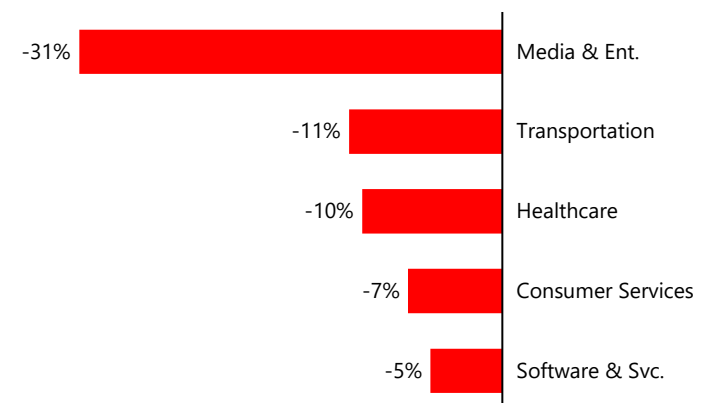
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Americana Res. Int PLC	2.0	2.1%	68.7	135.1
Aramco	27.4	-0.7%	27.6	757.2
Arabian Pipes	7.3	3.7%	12.5	90.7
Saudi National Bank	39.1	-0.9%	10.6	417.7
Al Rajhi Bank	66.7	-0.8%	9.4	626.1

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)	4,861.1	-0.1%	20.6	9.7%
MSCI (EM)	1,773.2	1.2%	13.0	26.3%
US (S&P500)	7,600.0	0.3%	22.4	11.0%
Nasdaq (CCMP Index)	27,086.8	0.4%	29.3	16.5%
UK (FTSE 100)	10,339.0	-0.7%	13.0	4.1%
EURO (STOXX 600)	621.2	-0.8%	15.3	4.9%
GER (DAX)	25,003.0	-0.4%	16.0	2.1%
JAP (NIKKEI 225)	66,934.3	0.9%	24.0	33.0%
CHN (SHCOMP)	4,057.7	-0.3%	14.3	2.2%
Hong Kong (HSI)	25,398.2	0.9%	11.3	-0.9%

Regional Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,009.5	-0.6%	14.6	4.9%
Dubai (DFM)	5,774.9	0.3%	9.8	-4.5%
Abu Dhabi (ADX)	9,650.5	-0.5%	10.7	-3.4%
Kuwait (KSE)	9,231.5	-0.8%	14.1	-2.8%
Qatar (QE)	10,438.9	-1.1%	11.8	-3.0%
Oman (MSM)	7,795.4	0.5%	13.3	32.9%
Bahrain (BHBX)	1,979.7	0.0%	6.4	-4.2%
Egypt (EGX)	20,906.1	2.1%	54.7	20.0%
Lebanon (BSX)	1,760.4	0.7%	N/A	-10.5%
Morocco (MASI)	18,922.2	0.3%	18.5	0.4%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	92.2	5.5%	5.5%	60.5%
Brent (USD/bbl)	95.0	3.2%	3.2%	56.1%
US Natural Gas (USD/mmbtu)	3.2	-3.3%	-3.3%	-13.7%
Gold (USD/oz)	4,485.0	-1.2%	-1.2%	3.8%
Silver (USD/oz)	74.8	-0.6%	-0.6%	4.4%
Naphtha (USD/ton)	760.0	-13.0%	-13.0%	50.5%
Ethylene (USD/ton)	1,115.0	0.0%	0.0%	52.7%
Urea (USD/ton)	682.5	0.0%	0.0%	73.9%
Sugar (USD/ton)	14.5	2.8%	2.8%	-3.7%
Wheat (USD/ton)	608.8	-0.3%	-0.3%	20.1%
Cotton (USD/lb)	80.2	0.7%	0.7%	19.9%
Aluminum (USD/ton)	3,716.0	1.4%	1.4%	24.1%

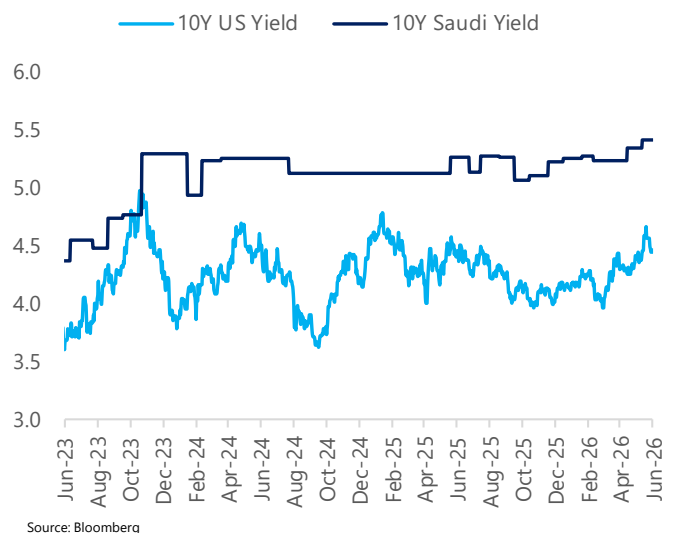
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	4.67	(22) bps	(22) bps	(18) bps
KSA SAIBOR 6M	5.14	(4) bps	(4) bps	(8) bps
SOFR 3M	3.64	(0) bps	(0) bps	(37) bps
SOFR 6M	3.69	(1) bps	(1) bps	(51) bps

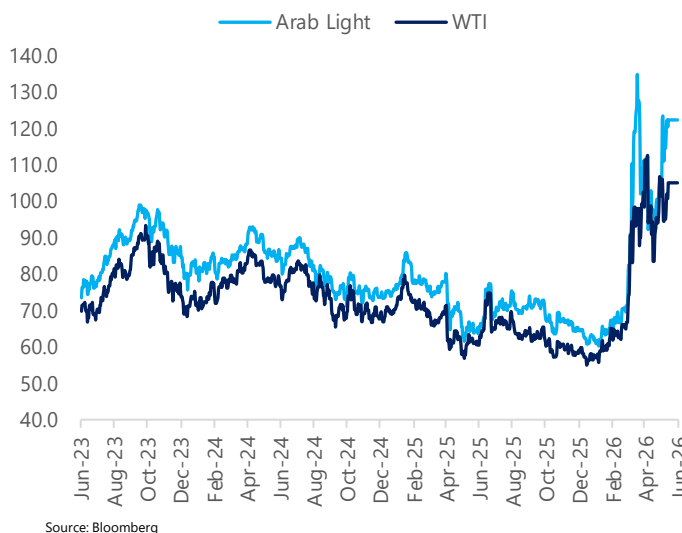
Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	0.0%	0.1%
GBP	0.74	0.0%	0.0%	0.2%
EUR	0.86	0.2%	0.2%	1.0%
JPY	159.66	0.2%	0.2%	1.9%
CHF	0.79	0.7%	0.7%	-0.7%
CNY	6.77	0.0%	0.0%	-3.2%

Bond Yield Rates (%)



Global Oil Price (USD/bbl)



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

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