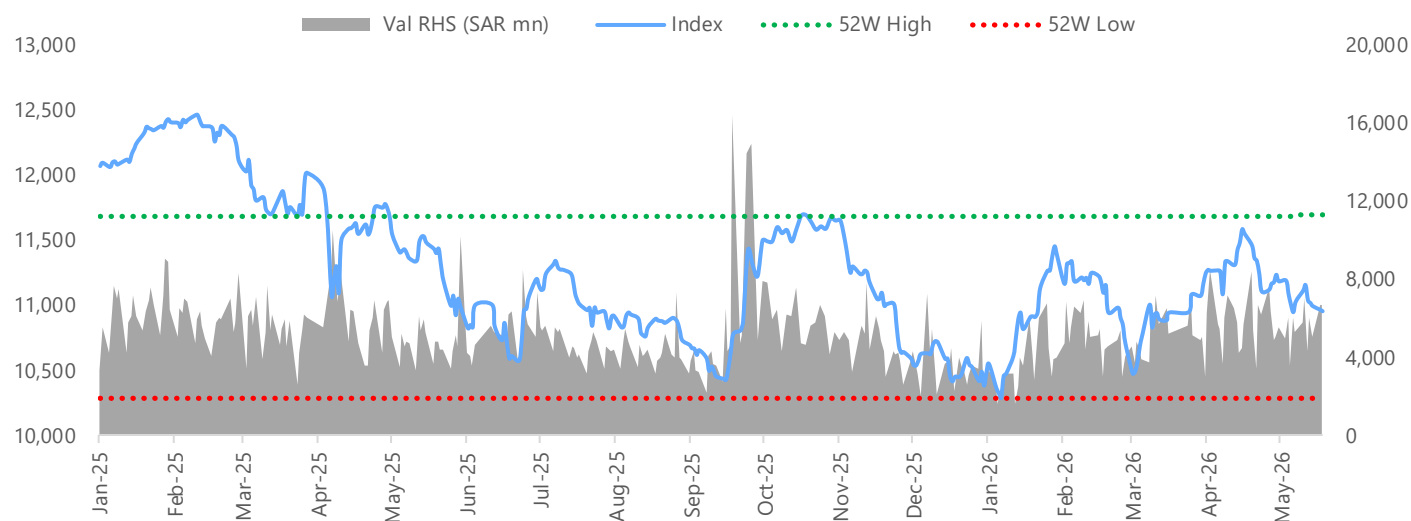


# Daily Market Watch

Tuesday, May 19, 2026

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▼ 10,956.10			▲ 4.6			▲ 4.4% YTD			▼ 22,723.91			▲ 16.6			▼ -2.5% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
-0.1%	-2.1%	4.4%	58.8%	35.8%	-5.5%	-4.2%	-3.4%	5.1%	-0.5%	-0.7%	-2.5%	20.3%	53.5%	-23.9%	-17.8%	9.1%	-9.4%

## TASI Performance



## Markets Performance/News

- U.S. stocks headed for a third consecutive day of declines on Monday, as little progress on de-escalating the situation in Iran kept inflation concerns front and center, with oil prices and bond yields remaining elevated. The Nasdaq and S&P 500 declined 0.5% and 0.1%, respectively. Asian markets were mixed on Tuesday morning, as CSI 300 declined 0.5% and Nikkei 225 fell 0.4%. While Hang Seng gained 0.4%. (Bloomberg)
- TASI declined 0.1% (11.8 points) to close at 10,956.10. Trading value increased by 58.8% compared to the previous session. The Transportation sector was the top laggard, losing 1.5%. Among the top decliners, AFG International Co. (CENOMI AB) fell 7.7%, followed by Perfect Presentation for Commercial Services Co. (2P AB), with a 6.2% downtick, while Thimar Development Holding Co. (THIMAR AB) declined 5.6%. (Tadawul)

## Major Economic/Sector News

- Saudi Arabia's Minister of Municipalities and Housing, Majed Al Hogail, said Riyadh is currently witnessing historically high demand for construction and development permits, signaling a significant pipeline of real estate supply set to enter the market. He said the real estate market remains stable across Saudi cities. On mortgage portfolios, the minister said the strength of Saudi mortgage assets and households' strong repayment track record have supported the securitization of mortgage portfolios internationally. Saudi Arabia aims to securitize SAR 150 bn in mortgage portfolios internationally by 2030. (Argaam)

## Major Corporate News

- Non-institutional foreign investors reduced their ownership in Tadawul-listed equities, excluding Saudi Aramco, from 11.26% to 11.21% (SAR 355.30 bn) in the week ended May 14. (Argaam)
- Sport Clubs Co. (SPORTCLU AB) announced the opening of a new female branch under the "Body Motions" brand in Al Nada district, Dammam. The financial impact of this branch is expected to appear in 2Q26. (Argaam)
- Sharakat, formerly known as Saudi Water Partnership Company (SWPC), is planning to announce the tender for the Kharj 3 Independent Sewage Treatment Plant project in Al Kharj, Riyadh in 3Q26. The Request for Proposal (RFP) is expected to be issued in November 2026, bid submissions in April 2027, while the preferred bidder award is expected in August 2027. The project involves construction of a sewage treatment plant with capacity of approximately 75,000 cubic metres per day (m3/day). The project completion is targeted for 4Q29. (Zawya)

- Sharakat, formerly known as Saudi Water Partnership Company (SWPC), is planning to announce the tender for the Riyadh North Independent Sewage Treatment Plant in Riyadh in 3Q26. The Expression of Interest (ROI)/Request for Qualification (RFQ) phase is expected to be tendered during October-December 2026 period. The project involves construction of a sewage treatment plant with capacity of approximately 120,000 cubic metres per day (m3/day) under a build-own-operate-transfer (BOOT) contract model. The Request for Qualification (RFQ) is scheduled for 1Q27, bid submissions scheduled for October 2027 and bidder award expected in April 2028. The project completion is targeted in 24 to 30 months from the date of award. (Zawya)
- Naqi Water Co. (NAQI AB) announced the approval to open two new branches in both Ad Dawadimi and Al Ghat governorates, as part of the company's expansion plans. (Tadawul)
- Alshehili Metal Industries Co. (ALSHEHIL AB) announced that it has received a purchase order from Ninja Supply Chain Co. worth SAR 6.4 mn (including VAT) for the purpose of supplying refrigerated trailers. The financial impact is expected to be reflected in the year ending 2026. (Tadawul)
- Etihad GO Telecom Co. (EAT AB) received the license issued by the National Cybersecurity Authority, which enables it to provide Level 2 Managed Security Operations Center (MSOC) services for a period of five years. (Argaam)

### Event Calendar

Date	Company	Event
19-May-26	Arabian Internet and Communications Services Co.	Ordinary Assembly Meeting
19-May-26	Ladun Investment Co.	Ordinary Assembly Meeting
19-May-26	Saudi Printing and Packaging Co.	Ordinary Assembly Meeting
19-May-26	Arabian Mills for Food Products Co.	Ordinary Assembly Meeting
19-May-26	Sumou Real Estate Co.	Ordinary Assembly Meeting
19-May-26	Saudia Dairy and Foodstuff Co.	Extraordinary General Meeting
19-May-26	Dkhoun National Trading Co.	Ordinary Assembly Meeting
19-May-26	Saudi Paper Manufacturing Co.	Ordinary Assembly Meeting
19-May-26	Banque Saudi Fransi	Ordinary Assembly Meeting
19-May-26	Nahdi Medical Co.	Extraordinary General Meeting
19-May-26	Arabian Internet and Communications Services Co.	Eligibility for Cash Dividend (SAR 8.00/sh)
19-May-26	Saudi Paper Manufacturing Co.	Eligibility for Cash Dividend (SAR 0.50/sh)
19-May-26	Banque Saudi Fransi	Eligibility for Cash Dividend (SAR 0.52/sh)
19-May-26	Dkhoun National Trading Co.	Eligibility for Cash Dividend (SAR 1.47/sh)
19-May-26	Bonyan REIT Fund	Eligibility for Cash Dividend (SAR 0.40/sh)
19-May-26	ASG Plastic Factory Co.	Cash Dividend Distribution (SAR 0.65/sh)
19-May-26	Arabian Mills for Food Products Co.	Eligibility for Cash Dividend (SAR 1.00/sh)

Source: Argaam, Bloomberg

### Economic Calendar

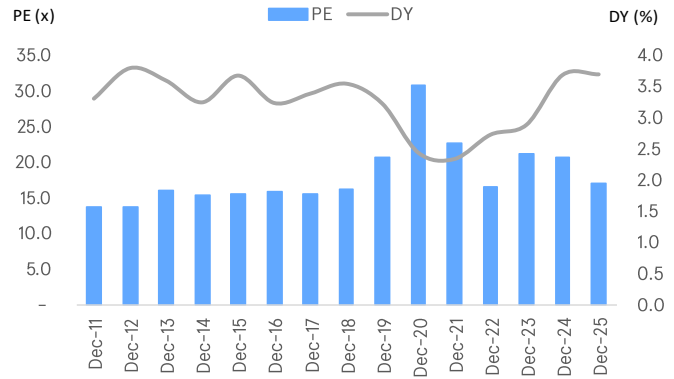
Date	Event	Prior	Estimation
19-May-26	US Fed Waller Speaks	-	-
19-May-26	US ADP Employment Change Weekly	33.0K	-
19-May-26	US Pending Home Sales (MoM)	1.5%	1.0%

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	4,609.8	2.1%	N/A	0.9%
Cons. Disc. & Ret.	7,388.4	1.5%	19.5	-0.7%
Software & Svc.	55,795.0	0.9%	20.4	-4.0%
Telecom	8,751.2	0.5%	14.5	-0.1%
Utilities	7,378.1	0.4%	20.6	1.3%

Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Transportation	4,203.0	-1.5%	14.8	-14.9%
Food & Beverages	4,312.3	-1.5%	15.6	-0.8%
Financial Services	5,126.9	-1.3%	21.8	-5.1%
Consumer Services	3,090.6	-1.1%	23.1	-12.2%
Comm. & Prof. Svc	3,810.1	-1.0%	14.9	-5.6%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Tabuk Agri Dev	6.1	5.7%	0.7	4.1
Saudi Chemical	8.5	4.2%	15.1	128.2
East Pipes Integrated	191.8	3.7%	0.3	49.4
Jarir Marketing	15.5	3.3%	5.2	80.3
Elm Co	709.0	2.8%	0.3	242.9

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Cenomi Retail	12.9	-7.7%	2.2	28.7
2P	6.5	-6.2%	1.9	12.8
Thimar	30.9	-5.6%	0.1	3.7
UIHC	44.4	-4.6%	0.4	18.9
Raydan Food Co.	13.9	-4.5%	0.0	0.6

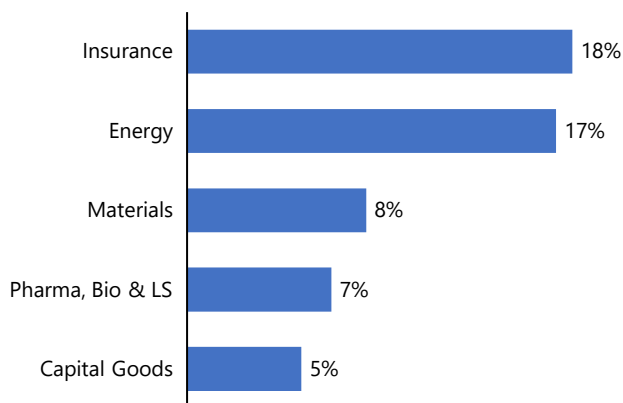
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Aramco	27.8	0.0%	16.7	465.1
Elm Co	709.0	2.8%	0.3	242.9
Al Rajhi Bank	66.4	0.2%	3.4	223.2
ACWA POWER Co.	181.0	-0.1%	0.8	143.5
Saudi National Bank	38.5	0.0%	3.7	142.3

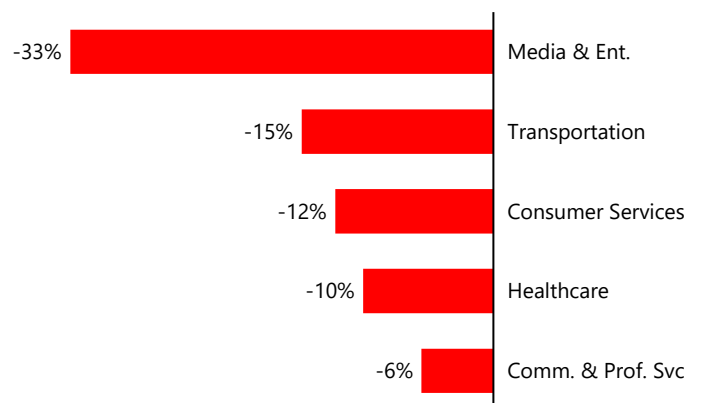
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Aramco	27.8	0.0%	16.7	465.1
Americana Res. Int PLC	1.9	0.0%	16.3	30.3
Saudi Chemical	8.5	4.2%	15.1	128.2
Rabigh	16.2	2.0%	7.7	124.6
Saudi Kayan	5.9	0.2%	7.2	42.3

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)	4,739.9	-0.0%	20.2	7.0%
MSCI (EM)	1,662.9	-0.3%	12.4	18.4%
US (S&P500)	7,403.1	-0.1%	22.1	8.1%
Nasdaq (CCMP Index)	26,090.7	-0.5%	31.7	12.3%
UK (FTSE 100)	10,323.8	1.3%	13.0	4.0%
EURO (STOXX 600)	610.2	0.5%	15.0	3.0%
GER (DAX)	24,307.9	1.5%	15.6	-0.7%
JAP (NIKKEI 225)	60,816.0	-1.0%	21.6	20.8%
CHN (SHCOMP)	4,131.5	-0.1%	14.5	4.1%
Hong Kong (HSI)	25,675.2	-1.1%	11.5	0.2%

**Regional Markets**

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	10,956.1	-0.1%	14.5	4.4%
Dubai (DFM)	5,609.6	-1.7%	9.4	-7.2%
Abu Dhabi (ADX)	9,561.4	-1.2%	10.6	-4.3%
Kuwait (KSE)	9,161.3	-0.4%	13.2	-3.5%
Qatar (QE)	10,372.1	-1.1%	11.8	-3.6%
Oman (MSM)	7,749.0	-2.4%	13.4	32.1%
Bahrain (BHBX)	1,919.8	-0.7%	6.2	-7.1%
Egypt (EGX)	20,432.0	-1.4%	53.8	17.3%
Lebanon (BSX)	1,753.4	0.0%	N/A	-10.8%
Morocco (MASI)	18,448.3	0.2%	17.7	-2.1%

**Commodity Price**

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	108.7	3.1%	3.4%	89.2%
Brent (USD/bbl)	112.1	2.6%	-1.7%	84.2%
US Natural Gas (USD/mmbtu)	3.0	2.2%	9.3%	-18.0%
Gold (USD/oz)	4,566.7	0.6%	-1.1%	5.7%
Silver (USD/oz)	77.7	2.3%	5.4%	8.4%
Naphtha (USD/ton)	926.2	0.7%	-1.1%	83.4%
Ethylene (USD/ton)	1,235.0	0.0%	-12.7%	69.2%
Urea (USD/ton)	755.0	0.0%	-16.8%	92.4%
Sugar (USD/ton)	14.7	-0.5%	1.0%	-1.9%
Wheat (USD/ton)	664.5	4.5%	6.5%	31.1%
Cotton (USD/lb)	83.7	3.8%	1.8%	25.2%
Aluminum (USD/ton)	3,569.0	0.2%	2.7%	19.1%

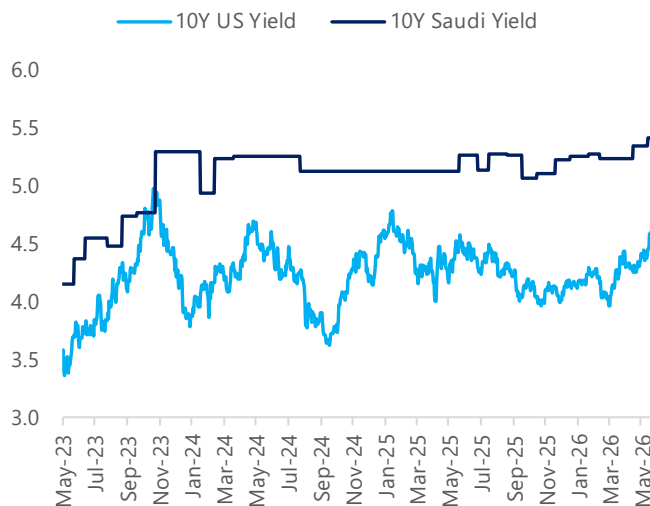
**Interest Rates**

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	4.81	7 bps	11 bps	(5) bps
KSA SAIBOR 6M	5.14	(1) bps	(12) bps	(9) bps
SOFR 3M	3.66	(0) bps	(1) bps	(35) bps
SOFR 6M	3.73	(1) bps	(4) bps	(47) bps

**Currency (Per USD)**

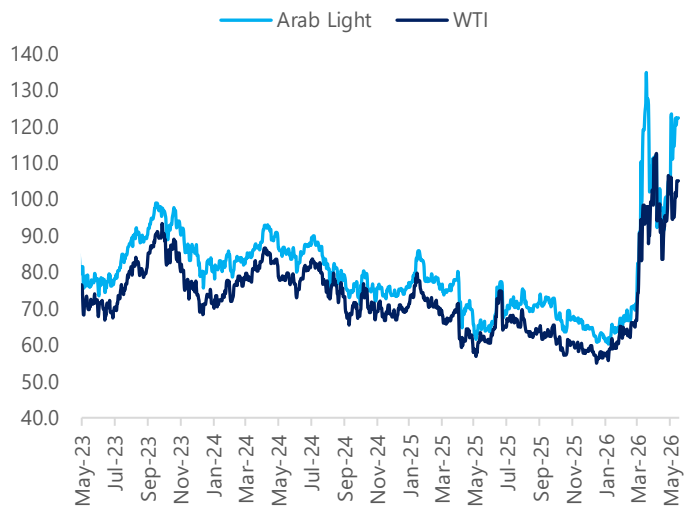
	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	0.1%	0.1%
GBP	0.74	-0.8%	1.3%	0.3%
EUR	0.86	-0.3%	0.6%	0.8%
JPY	158.82	0.1%	1.4%	1.3%
CHF	0.78	-0.3%	0.4%	-1.0%
CNY	6.80	-0.2%	-0.4%	-2.7%

**Bond Yield Rates (%)**



Source: Bloomberg

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



Source: Bloomberg

\*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.