

## Daily Market Watch

Sunday, May 25, 2025

Main Market TASI									Nomu Market								
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▼ 11,188.7			▲ 4.4			▼ -7.0% YTD			▼ 27,260.7			▲ 29.8			▼ -13.4% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
-1.0%	-4.1%	-7.0%	0.7%	-5.0%	-19.3%	-8.0%	-9.3%	58.7%	-0.6%	-3.6%	-13.4%	18.5%	-41.9%	-11.8%	1.5%	22.1%	280.2%

- Shalfa Facilities Management Co. (SHALFA AB) signed a SAR 35.39 mn contract with ZATCA, in partnership with Shalfa International Security Services. The financial impact is expected in H2 2025. (Argaam)
- Etihad Atheeb Telecommunications Co. (EAT AB) received a letter of no objection from the Saudi Central Bank (SAMA) to change the name of its subsidiary from Hulool Al-Intilaq Finance to Al-Hulul Al-Muntilga Co. (Argaam)
- The Knowledge Economic City Co. (KEC AB) secured a Sharia-compliant corporate financing worth SAR 150 mn from Al Rajhi Bank. (RJHI AB). The fund will be directed to finance the company's working capital and support the execution of its strategic objectives. (Argaam)
- Saudi Arabian Oil Co. (ARAMCO AB) achieved a global milestone by successfully commissioning a megawatt (MW)-scale renewable energy storage system for gas production, using for the first time an iron-vanadium redox flow battery as a backup for solar-assisted power for gas well operations.. (Argaam)
- Tabuk Agricultural Development Co. (TAACO AB) signed an agreement with the Agricultural Development Fund (ADF) to obtain an operational financing loan in accordance with ADF's regulations and lending guidelines, a statement said to Tadawul. Valued at SAR 15 mn, the loan is scheduled for repayment on May 22, 2027. (Argaam)
- Perfect Presentation for Commercial Services Co. (2P AB) announced the renewal of a Shariah-compliant credit facility deal worth SAR 265 mn with Al Rajhi Bank (RJHI AB). (Argaam)

## Event Calendar

Date	Company	Event
25-May-25	WATANIYA	Extraordinary General Meeting
25-May-25	BCI	Eligibility for Cash Dividend (SAR 1.00/sh)
25-May-25	BCI	Ordinary Assembly Meeting
25-May-25	RAOOM	Eligibility for Cash Dividend (SAR 0.37/sh)
25-May-25	FARM SUPERSTORES	Ordinary Assembly Meeting
25-May-25	MAKEEN	Close of Offering
25-May-25	RIYAL	Eligibility for Cash Dividend (SAR 0.50/sh)
25-May-25	RIYAL	Ordinary Assembly Meeting
25-May-25	KINGDOM	Extraordinary General Meeting
25-May-25	SEERA	Ordinary Assembly Meeting
25-May-25	RAYDAN	Ordinary Assembly Meeting
25-May-25	AME	Eligibility for Cash Dividend (SAR 2.00/sh)
25-May-25	ARDCO	Cash Dividend Distribution (SAR 0.25/sh)
25-May-25	SIECO	Ordinary Assembly Meeting
25-May-25	AWPT	Eligibility for Cash Dividend (SAR 1.50/sh)
25-May-25	AWPT	Ordinary Assembly Meeting
25-May-25	NABA ALSAHA	Ordinary Assembly Meeting
25-May-25	CMCER	Cash Dividend Distribution (SAR 0.05/sh)
25-May-25	ALMOOSA	Eligibility for Cash Dividend

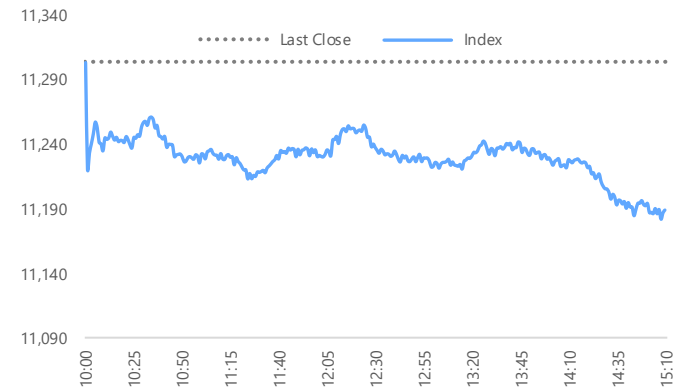
Source: Argaam, Bloomberg

## Economic Calendar

Date	Event	Prior	Estimation
27-May-25	US Durable Goods Orders	7.50%	-7.80%
27-May-25	US Durables Ex Transportation	-0.40%	0.00%

Source: Argaam, Bloomberg

### TASI Intraday Performance



### Top Performers – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
RE. Mgmt. & Dev.	3,933.2	0.5%	-5.7%	7.0%
Insurance	9,069.6	0.4%	-2.5%	-14.6%
Food & Beverages	5,196.5	0.4%	-4.7%	-13.6%
Con Stap, Dist & Ret.	7,695.2	0.2%	-2.4%	-8.0%
Materials	5,076.1	0.1%	-2.5%	-8.8%

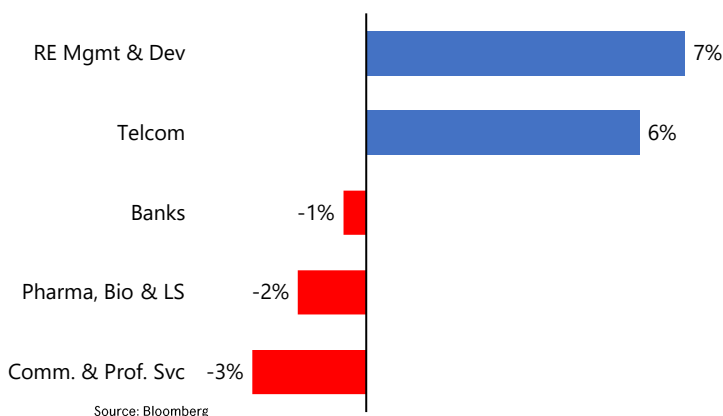
### Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Saudi Reinsurance	49.0	3.7%	0.9	43.6
Alrajhi Takaful	119.2	3.7%	0.2	19.7
Umm Al-Qura Cement	17.5	3.4%	0.1	1.7
Retal Urban Dev. Co.	15.2	3.4%	2.6	40.0
Albabbtain	51.5	3.3%	1.3	67.2

### Value Leaders – Companies

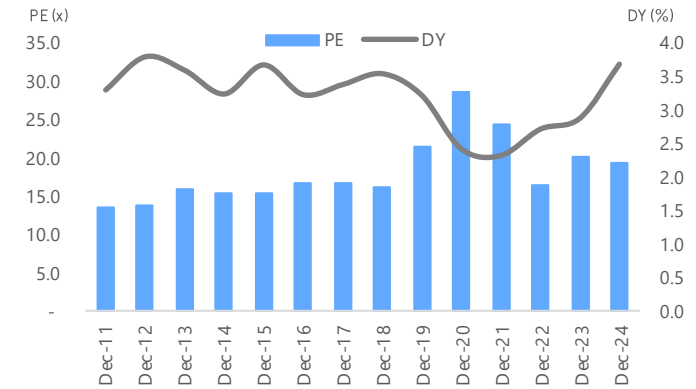
	Last Close	%Δ	Vol (mn)	Val (SR mn)
Aramco	25.2	-3.6%	15.6	398.8
Al Rajhi Bank	94.0	-2.1%	3.7	348.1
Saudi National Bank	35.5	1.1%	4.5	159.1
Alinma Bank	27.3	-0.7%	5.1	138.7
STC	42.6	-0.8%	3.1	133.9

### Top Performers – Sectors YTD Performance



Source: Bloomberg

### Historical Tadawul PE and DY



### Top Laggards – Sectors

	Last Close	%Δ	MTD %Δ	YTD %Δ
Energy	4,771.1	-3.5%	-0.9%	-10.0%
Media & Ent.	18,523.5	-2.4%	-14.6%	-42.0%
Household & Personal	4,806.6	-2.0%	12.4%	-4.7%
Financial Services	6,382.5	-1.5%	-6.0%	-17.5%
Telecom	8,340.7	-1.2%	-10.1%	6.0%

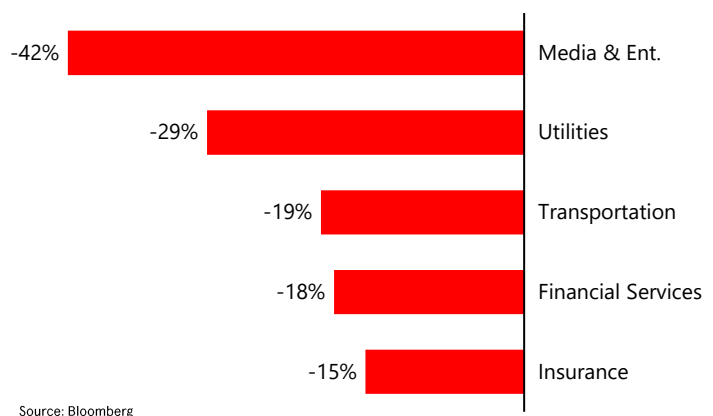
### Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
SHL Finance	19.3	-4.9%	0.1	2.2
Al-Etihad Coop. Ins.	13.4	-3.9%	0.2	3.2
Aramco	25.2	-3.6%	15.6	398.8
Tourism Enterprise	0.8	-3.6%	26.5	21.6
Cenomi Retail	16.7	-3.5%	1.4	24.2

### Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SR mn)
Tourism Enterprise	0.8	-3.6%	26.5	21.6
Americana Res. Int PLC	2.2	-0.9%	17.3	37.9
Aramco	25.2	-3.6%	15.6	398.8
Al-Baha Invt. & Dev.	3.8	-1.3%	6.8	25.9
Batic Inv. & Log.	2.3	-0.4%	6.4	14.9

### Top Laggards – Sectors YTD Performance



Source: Bloomberg

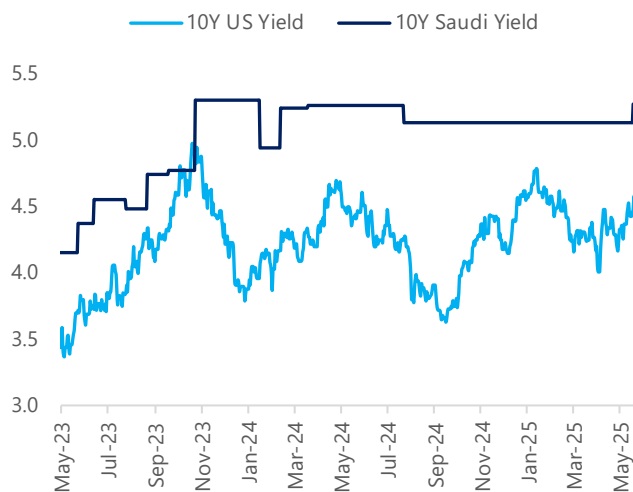
### International Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
MSCI (World)	3,802.8	-0.4%	20.1	2.6%
MSCI (EM)	1,171.0	0.5%	12.9	8.9%
US (S&P500)	5,802.8	-0.7%	22.3	-1.3%
Nasdaq (CCMP Index)	18,737.2	-1.0%	28.4	-3.0%
UK (FTSE 100)	8,718.0	-0.2%	13.4	6.7%
EURO (STOXX 600)	545.1	-0.9%	15.1	7.4%
GER (DAX)	23,629.6	-1.5%	16.5	18.7%
JAP (NIKKEI 225)	37,160.5	0.5%	18.0	-6.9%
CHN (SHCOMP)	3,348.4	-0.9%	13.0	-0.1%
Hong Kong (HSI)	23,601.3	0.2%	10.6	17.7%

### Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	61.5	0.5%	5.7%	-14.2%
Brent (USD/bbl)	64.8	0.5%	2.6%	-13.2%
US Natural Gas (USD/mmbtu)	3.3	2.5%	0.2%	-8.2%
Gold (USD/oz)	3,357.5	1.9%	2.1%	27.9%
Silver (USD/oz)	33.5	1.3%	2.6%	15.8%
Naphtha (USD/ton)	546.2	-0.0%	-0.1%	-10.7%
Ethylene (USD/ton)	875.0	0.0%	0.0%	-5.4%
Urea (USD/ton)	395.0	0.0%	0.0%	9.0%
Sugar (USD/ton)	17.3	-0.6%	-1.0%	-10.2%
Wheat (USD/ton)	542.5	-0.4%	5.8%	-1.6%
Cotton (USD/lb)	66.1	0.7%	0.1%	-6.2%
Aluminum (USD/ton)	2,463.5	0.3%	2.7%	-3.4%

### Bond Yield Rates (%)



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

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### Regional Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,188.7	-1.0%	14.6	-7.0%
Dubai (DFM)	5,464.2	0.2%	9.4	5.9%
Abu Dhabi (ADX)	9,665.3	-0.0%	14.9	2.6%
Kuwait (KSE)	8,718.7	-0.2%	18.0	11.2%
Qatar (QE)	10,774.3	0.0%	11.8	1.9%
Oman (MSM)	4,497.5	0.6%	9.2	-1.7%
Bahrain (BHBX)	1,922.4	0.1%	6.8	-3.2%
Egypt (EGX)	12,776.7	0.7%	23.6	13.9%
Lebanon (BSX)	1,975.4	-0.8%	N/A	-24.8%
Morocco (MASI)	18,112.4	-0.1%	20.1	22.6%

### Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	5.31	(10) bps	(7) bps	(23) bps
KSA SAIBOR 6M	5.30	(3) bps	2 bps	(16) bps
SOFR 3M	4.35	(0) bps	(1) bps	(34) bps
SOFR 6M	4.42	(0) bps	(5) bps	(61) bps

### Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	-0.0%	0.0%	-0.1%
GBP	0.74	-0.9%	-1.5%	-7.5%
EUR	0.88	-0.7%	-0.3%	-8.9%
JPY	142.56	-1.0%	-0.4%	-9.3%
CHF	0.82	-1.0%	-0.6%	-9.5%
CNY	7.18	-0.3%	-1.2%	-1.6%

### Global Oil Price (USD/bbl)

