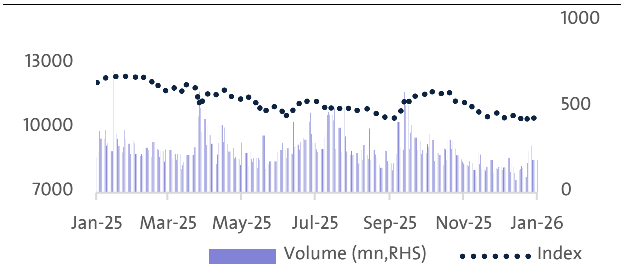
alinma capital

# Daily Market Report

### Key Indices-Return and Valuation

| | 29-May* | DoD | MTD | YTD | P/E | P/BV |
|---|---|---|---|---|---|---|
| TASI | 11028 | 0.4% | -1.4% | 5% | 14.6 | 1.6 |
| NOMU | 22906 | 0.6% | 0.1% | -3% | 0.0 | 1.6 |
| S&P500 | 7580 | 0.2% | 4.8% | 11% | 22.3 | 5.8 |
| Dow Jones | 51032 | 0.7% | 3.1% | 6% | 13.0 | 5.9 |
| FTSE 100 | 10409 | -0.2% | 0.4% | 5% | 13.0 | 2.4 |
| EuroStoxx50 | 6051 | -0.1% | 2.9% | 4% | 15.8 | 2.4 |
| Nikkei225 | 66330 | 2.5% | 11.5% | 32% | 24.1 | 3.0 |
| MSCI EM | 1752 | 1.6% | 9.4% | 25% | 12.9 | 2.5 |
| SHCOMP | 4069 | -0.7% | -1.1% | 3% | 14.4 | 1.6 |

### TASI- Index and Volume Trends




### Advance to Decline Ratio

| | Advance | Decline | Unchanged | A/D |
|---|---|---|---|---|
| 21-May | 119 | 135 | 16 | 0.9:1 |

### Money Market Yields

| % | SAIBOR | | | Term SOFR | | |
|---|---|---|---|---|---|---|
| | 21-May | Δ bps | YTD Av | 29-May | Δ bps | YTD Av |
| 1M | 4.58 | -8.7 | 5.6 | 3.62 | 0.0 | 4.3 |
| 3M | 4.69 | -4.6 | 5.4 | 3.66 | -0.5 | 4.3 |
| 6M | 5.23 | 11.6 | 5.5 | 3.72 | -1.3 | 4.2 |
| 12M | 4.81 | 7.2 | 5.2 | 3.84 | -2.2 | 4.0 |

### Commodities

| | | 29-May | Δ | 52-week | | YTD Av |
|---|---|---|---|---|---|---|
| | Unit | USD | % | Hi | low | %Δ |
| Arab Light | USDbbl | 110 | -4.0 | 135 | 60 | -9.1 |
| Brent | USDbbl | 92 | -1.8 | 118 | 59 | -9.2 |
| Gold | USDOz | 4526 | 3.0 | 5502 | 3277 | -17.4 |
| Silver | USDOz | 75 | -0.4 | 117 | 33 | -33.4 |
| Aluminum | USDton | 3768 | 0.4 | 3752 | 2438 | -11.4 |
| Copper | USDton | 13657 | 0.6 | 14140 | 9565 | -13.0 |

Av=Average, YTD=Year to Date, MTD=Month to Date, DoD=Day Over Day (*last session relative to session before) **Per 25ton, Source: Bloomberg, TASI

## Saudi Arabia

### Saudi Arabia records 1.7mln pilgrims for Haj 2026

The General Authority for Statistics announced on Tuesday that the total number of pilgrims performing Hajj this year reached 1,707,301. According to the authority, 1,546,655 pilgrims arrived from outside Saudi Arabia representing 165 nationalities through the Kingdom's various entry points, while 160,646 pilgrims were citizens and residents from within the Kingdom. The authority said the total number of male pilgrims from inside and outside Saudi Arabia reached 893,396, compared to 813,905 female pilgrims. **(Zawya)**

### Saudi Ground Services Gets 6.3B Riyal Contract Across Airports

Saudi Ground Services says it was awarded a 6.3b riyal contract from Saudi Airlines for Air Transport Co. for ground handling, ramp handling and passenger services for its domestic and international flights at all airports across Saudi Arabia. **(Bloomberg)**

### Saudi Contractor's Owners Seek Up To $800 Million in Riyadh IPO

Saudi Arabia's Mutlaq Al-Ghowairi Contracting Co.'s shareholders are seeking up to 3 billion riyals ($799 million) in a Riyadh initial public offering, in what would be the Gulf's first major listing this year.The contractor's owners are offering 240 million shares, representing a 30% stake, between 11 riyals and 12.5 riyals ($2.93 to $3.33) apiece, according to a statement on Sunday. At the top end of the range, MGC, as the company is known, would be valued at 10 billion riyals. **(Blomberg)**

### Arabian Pipes Signs SAR62 Million Steel Pipes Contract with Saudi Aramco

Arabian Pipes Coentered into a 62 million-Saudi-riyal contract with Saudi Arabian Oil Co. (SASE:2222), d/b/a Saudi Aramco. Under the agreement, the Saudi-listed steel tube manufacturer will produce and deliver steel pipes to the oil giant for a period of 10 months, according to a Sunday release.. **(Bloomberg)**

### Saudi CMA refers 17 Cenomi Retail suspects to Public Prosecution over alleged market violations

Saudi Arabia's Capital Market Authority has referred 17 suspects linked to Cenomi Retail to the Public Prosecution over suspected violations of the Capital Market Law, Market Conduct Regulations and Companies Law. The suspects include former and current board members, a chief executive officer, several financial managers at the company, and members of the audit team at the company's former external auditor. **(Saudi Gazette)**

## Global

### China's factory activity flat in May, PMI shows

China's factory activity came in flat in May, an official survey showed on Sunday, indicating that the manufacturing sector was under pressure from weak domestic demand and higher production costs. **(Reuters)**

### Top euro zone countries see Iran inflation fallout broaden in May

Inflation in the euro zone's four largest economies hovered above the European Central Bank's 2% target for a third straight month in May, preliminary data showed on Friday, as a rise in fuel costs triggered by the Iran war began to feed through to other prices. **(Reuters)**

## Commodities

### US crude production largely steady on the month in March, EIA says

U.S. crude production was largely steady in March at 13.7 million barrels per day, according to the Energy Information Administration on Friday. Crude production in Texas fell to 5.78 million bpd, marking a four-month low, while output in neighboring New Mexico was steady on the month at 2.31 million bpd. **(Reuters)**

Please refer to page III for important disclosures



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# Daily Market Report

| TASI & NOMU- Key Statistics | | | | | | |
|---|---|---|---|---|---|---|
| | | 20-May | 21-May | Δ% | | |
| **TASI** | SAR | | | **DoD** | **MTD*** | **YTD*** |
| Market Cap | bn | 2277 | 2286 | 0.4% | -1.4% | 2.5% |
| Value | mn | 4857 | 10589 | 118.0% | 83.2% | 98.4% |
| Volume | mn | 210 | 324 | 54.2% | 25.0% | 24.8% |
| **NOMU** | | | | | | |
| Market Cap | mn | 7349 | 7389 | 0.6% | 0.1% | -2.6% |
| Value | mn | 18.1 | 25.3 | 39.8% | -54.1% | -2.3% |
| Volume | mn | 1.6 | 2.2 | 32.7% | -34.1% | -11.8% |

*Average for the period, Source: Argaam

| NOMU-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| PAPER HOME | 37.76 | 3.24 | 9% |
| WAJD LIFE | 5.01 | 0.37 | 8% |
| RAWASI | 3.88 | 0.28 | 8% |
| **NOMU-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| TAQAT | 8.84 | -0.98 | -10% |
| MUNAWLA | 20.26 | -2.24 | -10% |
| QOMEL | 49.02 | -4.98 | -9% |

Source: Tadawul

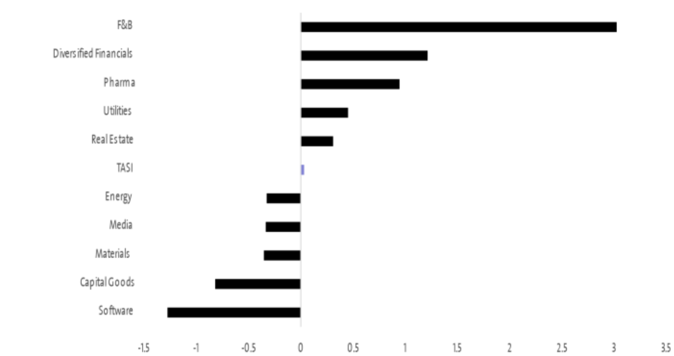
| TASI-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| KINGDOM | 12.35 | 0.95 | 8% |
| EMAAR EC | 10.88 | 0.72 | 7% |
| TAPRCO | 15.08 | 0.98 | 7% |
| **TASI-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| RAYDAN | 13.04 | -0.49 | -4% |
| ENAYA | 11.16 | -0.35 | -3% |
| TASHEEL | 39.9 | -1.18 | -3% |

Source: Tadawul

| TASI -Most Traded by Volume | Last Price | Change | | Volumes |
|---|---|---|---|---|
| | SAR/sh | SAR | % | mn |
| DBS | 12.87 | 0.37 | 3% | 36.7 |
| SAUDI ARAMCO | 27.9 | 0.04 | 0% | 29.6 |
| AMERICANA | 1.92 | -0.01 | -1% | 19.3 |
| **TASI -Most Traded by Value** | **Last Price** | **Change** | | **Value** |
| | SAR/sh | SAR | % | SARmn |
| ACWA | 184.7 | 1.4 | 1% | 1622 |
| MAADEN | 62.15 | 1.15 | 2% | 1038 |
| ALRAJHI | 66.6 | -0.5 | -1% | 965 |

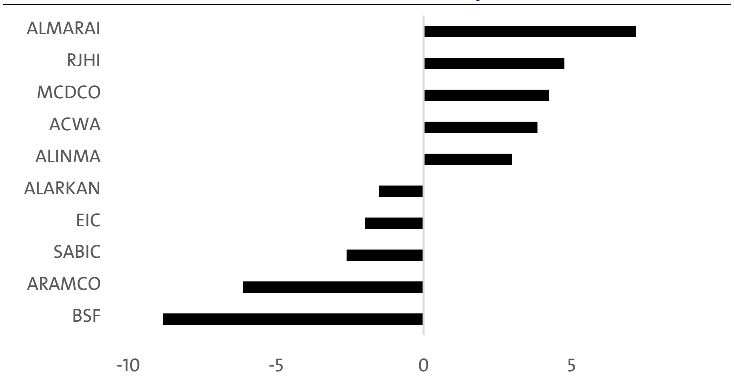
Source: Tadawul

## TASI- Sector-Wise Daily Performance (%)




Source: Bloomberg

## TASI: Point Contribution to TASI movement by Stocks




Source: Bloomberg

## TASI Market Calendar

| Date | Stock/Data release | Event |
|---|---|---|
| 31-May | SAMA | Report |
| 01-Jun | JARIR | Ex-Dividend |
| 01-Jun | SAUDI ARAMCO | Ex-Dividend |
| 02-Jun | SEERA | Capital reduction |
| 01-Jun | MCDC | Ex-Dividend |

Source: Argaam, GSTAT

## Global Market Calendar

| Date | Country | Event | Period | Forecast | Previous |
|---|---|---|---|---|---|
| 1-Jun | U.K. | Net Lending to Individuals | May | 7.100B | 8.000B |
| 1-Jun | E.U. | CPI, n.s.a (May) | May | | 103.04 |
| 1-Jun | U.K. | BoE Gov Bailey Speaks | May | | 0.00% |
| 2-Jun | U.S. | Gasoline Inventories | May | | -2.572M |
| 2-Jun | U.S. | EIA Weekly Refinery Utilization | May | | 2.9% |

Source: Bloomberg, Investing.Com



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# Daily Market Report

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