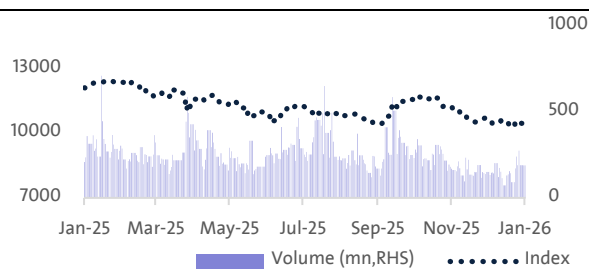


Daily Market Report

Key Indices-Return and Valuation

	17-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11486	0.5%	1.9%	9%	15.8	1.5
NOMU	22965	0.1%	1.8%	-2%	0.0	1.5
S&P500	7126	1.2%	8.4%	4%	21.8	5.5
Dow Jones	49447	1.8%	6.2%	3%	13.6	5.6
FTSE 100	10668	0.7%	2.9%	7%	13.6	2.4
EuroStoxx50	6058	2.1%	5.7%	5%	16.2	2.5
Nikkei225	58476	-1.8%	8.8%	16%	23.5	2.8
MSCI EM	1597	-0.4%	9.6%	14%	12.7	2.4
SHCOMP	4051	-0.1%	2.6%	2%	17.1	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
16-Apr	146	104	20	1.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	16-Apr	Δ bps	YTD Av	17-Apr	Δ bps	YTD Av
1M	4.72	3.5	5.6	3.66	-0.7	4.3
3M	4.83	7.5	5.4	3.68	-0.5	4.3
6M	4.98	-23.7	5.5	3.69	-0.5	4.2
12M	4.70	-7.6	5.2	3.69	-0.7	4.0

Commodities

	Unit	17-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	97	-0.9	135	60	-2.6
Brent	USDbbbl	90	-9.1	118	59	-3.3
Gold	USDOz	4796	-0.4	5502	3171	-14.3
Silver	USDOz	81	3.2	117	32	-27.1
Aluminum	USDton	3590	-2.4	3687	2330	-7.0
Copper	USDton	13210	-0.2	13952	9134	-9.4

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

Financial stability backed by strong banking sector: SAMA Deputy

Deputy Governor for Investment at SAMA, Majid A. Alawwad, said the stability of the financial system is based on the strength of the Kingdom's banking sector. This is supported by adequate capitalization, strong liquidity and solid reserve levels. He added that asset quality indicators remain at good levels, enhancing the sector's stability and its ability to absorb shocks. **(Argaam)**

Acwa, SPPC sign SAR 11.5B PPA for Rabigh 2 power plant expansion

ACWA Power (Acwa) signed a power purchase agreement (PPA) with Saudi Power Procurement Co. (SPPC), valued at SAR 11.5 billion. The deal covers the Rabigh 2 independent power plant expansion, a combined-cycle gas-fired project located in Makkah, with a generation capacity of 2,313.5 megawatts and readiness for carbon capture integration. **(Argaam)**

Leejam expands in Jeddah with 2 new fitness centers

Leejam Sports Co. opened on April 18 two new fitness centers in Murjan District, Jeddah, according to a statement on Tadawul. 'Fitness Time-Ladies' is dedicated for women, and 'Fitness Time' for men. Both boast of state-of-the-art facilities and services of that brand's category. They will also have high-spec sports equipment as well as the latest designs for halls. **(Argaam)**

Jarir's Q1 sales boosted by increase in inventory, upbeat consumer behavior: Chairman

Jarir Marketing Co. decided to increase its inventory in December 2025 in anticipation of price increases from suppliers. This helped secure sufficient stock and supported sales during the first quarter, Chairman Muhammad Alagil told Argaam. The decision involved a calculated risk, leveraging product availability at a time when markets were experiencing supply chain disruptions and rising prices, he added. **(Argaam)**

Riyadh Cables plans to buy back 300,000 treasury shares

Riyadh Cables Co. plans to repurchase 300,000 ordinary shares and hold them as treasury shares allocated to the employee long-term stock incentive program. The Saudi firm will self-finance the buyback, it said in a statement to Tadawul, adding that the company currently holds 0.188% treasury shares. **(Argaam)**

Global

China expected to keep benchmark lending rates steady after strong GDP data

China is expected to leave benchmark lending rates unchanged for an 11th consecutive month in April, a Reuters survey showed, as robust first-quarter growth and a pick-up in inflation have weakened the case for additional monetary stimulus. This week, China's economy logged 5.0% growth, picking up from 4.5% in the previous quarter, and at the top of its full-year target range. **(Reuters)**

BOJ chief avoids hints of April rate hike, shattering hawkish market bets

Bank of Japan Governor Kazuo Ueda steered clear of signalling a rate hike was on the cards this month, instead highlighting the country's low real interest rates and robust corporate profits, heightening the chance it will hold fire at least until June. **(Reuters)**

Commodities

Oil falls, posts weekly losses

Oil prices declined on Friday, posting weekly losses amid rising hopes for an end to the war in the Middle East, after Iran reopened the Strait of Hormuz during the ceasefire. Brent crude futures for June delivery fell 9.10%, or \$9.01, to \$90.38 per barrel, recording a weekly loss of 5%. US Nymex crude futures for May delivery dropped 11.45%, or \$10.84, to \$83.85 per barrel, falling 13.17% over the week. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics

		15-Apr	16-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2402	2395	-0.3%	0.3%	7.4%
Value	mn	7575	6384	-15.7%	7.5%	22.5%
Volume	mn	369	328	-11.1%	9.5%	30.0%
NOMU						
Market Cap	mn	7446	7509	0.8%	3.2%	-1.0%
Value	mn	23.2	22.9	-1.2%	0.5%	18.9%
Volume	mn	3.9	2.8	-27.4%	10.2%	28.0%

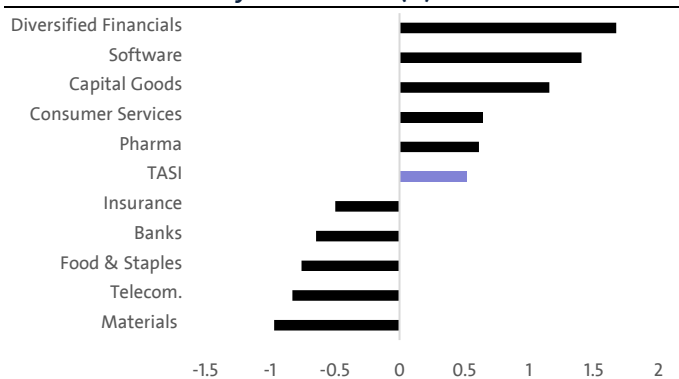
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NICE ONE	14.11	0.84	6%
NOFOTH	8.48	0.49	6%
MARAFIQ	34.62	1.78	5%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ACC	23.09	-0.97	-4%
AMAK	89.1	-3.4	-4%
SNB	42.46	-1.38	-3%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
19-April	ALMODAWAT	Eligibility of Cash Dividend
20-April	ALRAJHI	Eligibility of Cash Dividend
20-April	CITY CEMENT	Cash Dividend
20-April	RIYADH CEMENT	General assembly
21-April	SAB	Eligibility of Cash Dividend

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
AQASEEM	4	0.53	15%
NAAS PETROL	34	3	10%
NASEEJ TECH	42.9	3.3	8%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ASAS MAKEEN	68.1	-10.7	-14%
DKHOUN	56.85	-5.7	-9%
MULTI BUSINESS	8.51	-0.69	-8%

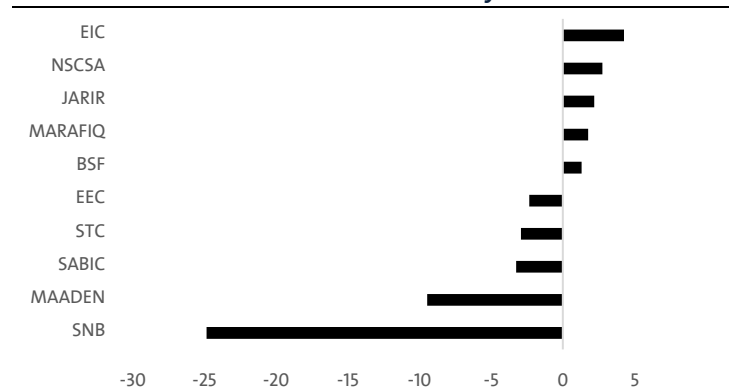
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.92	0	0%	33.0
SAUDI KAYAN	5.42	0.04	1%	18.8
CHEMICAL	8.42	0.28	3%	17.6

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	109.2	-0.1	0%	379
SAUDI ARAMCO	27.52	-0.02	0%	358
ELM	609.5	9	2%	185

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
20-Apr	C.Y.	Loan Prime Rate 5Y	Apr	3.5%	3.5%
22-Apr	U.K.	Consumer Price Index (CPI) YoY	Apr	3.0%	3.0%
23-Apr	U.S.	S&P Global Services PMI (Apr)	Apr	51.1	51.7
23-Apr	U.S.	Initial Jobless Claims	Apr	212K	207K
23-Apr	U.S.	Retail Sales (YoY)	Apr		2.5%

Source: Bloomberg, Investing.Com

Daily Market Report

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