

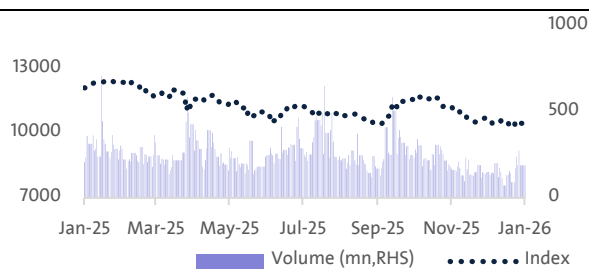


Daily Market Report

Key Indices-Return and Valuation

	21-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11345	-0.2%	0.6%	8%	15.5	1.5
NOMU	22860	0.0%	1.4%	-3%	0.0	1.5
S&P500	7064	-0.6%	7.4%	3%	21.6	5.6
Dow Jones	49149	-0.6%	5.5%	2%	13.4	5.7
FTSE 100	10498	-1.0%	1.3%	6%	13.4	2.4
EuroStoxx50	5930	-0.9%	3.4%	2%	15.8	2.5
Nikkei225	59349	0.9%	10.4%	18%	23.8	2.8
MSCI EM	1615	0.9%	10.8%	15%	12.5	2.4
SHCOMP	4085	0.1%	3.5%	3%	17.4	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
21-Apr	118	138	13	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	21-Apr	Δ bps	YTD Av	17-Apr	Δ bps	YTD Av
1M	4.65	-7.5	5.6	3.65	-0.5	4.3
3M	4.79	-3.7	5.4	3.66	-0.9	4.3
6M	4.96	-2.6	5.5	3.66	-2.1	4.2
12M	4.77	7.1	5.2	3.64	-4.6	4.0

Commodities

	Unit	21-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	92	-2.5	135	60	-2.8
Brent	USDbbbl	98	3.1	118	59	-3.4
Gold	USDOz	4783	0.0	5502	3171	-14.4
Silver	USDOz	77	-3.8	117	32	-27.4
Aluminum	USDton	3606	0.4	3687	2330	-7.2
Copper	USDton	13290	0.4	13952	9134	-9.5

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

FDIs rise 13% to SAR 1.09T in 2025

Foreign direct investments (FDIs) inflows to Saudi Arabia grew 13% year-on-year (YoY) to about SAR 1.099 trillion at the end of 2025. FDIs accounted for about 33% of total foreign investment in the Kingdom, according to the latest data issued by the Saudi Central Bank (SAMA). **(Argaam)**

Berain secures CMA nod to float 66M shares on TASI

The Capital Market Authority (CMA) approved today, April 21, the application submitted by Berain Water Co. to float 66 million shares, or 30% of its capital (220 million shares), on the Main Market (TASI). The company will issue the offering prospectus within sufficient time ahead of the initial public offering (IPO), the market regulator said in a statement. **(Argaam)**

Riyadh Development to sell fund units to Sumou Holding for SAR 184.5M

Riyadh Development Co. said it signed an agreement on April 22 to sell all of its units in Al Arabi Riyadh Development Real Estate Fund to Sumou Holding Co. for SAR 184.5 million. **(Argaam)**

Horizon Food inks product supply deal with Maonah Trading

Horizon Food Co. today, April 21, signed a supply agreement with Maonah Trading Co., one of the top food distribution companies in Riyadh. The agreement includes the supply of a range of Horizon Food products, especially cooked shawarma, manufactured at its plant **(Argaam)**

CMA seeks public views on draft amendments to enhance cooperation with foreign regulators

The Capital Market Authority (CMA) invited all interested parties, stakeholders, and market participants to provide their feedback on the proposed amendments to Articles 5 and 18 of the Capital Market Law for a period of 30 days ending on May 21. The proposed amendments aim to enhance international cooperation between the CMA and foreign counterpart authorities, in line with best international practices. In addition to strengthening confidence in the capital market. **(Argaam)**

Multi Business gets CMA nod on 200% capital increase via bonus issue

The Capital Market Authority (CMA) granted Multi Business Group Co. the approval to increase its capital from SAR 15 million to SAR 45 million. In the regulator's statement, the authority said the increase will be carried out through the issuance of two bonus shares for every one held. **(Argaam)**

Global

UK inflation rises to 3.3% as Iran war impact begins to hit

British consumer price inflation rose to an annual rate of 3.3% in March from 3.0% in February, according to official figures published on Wednesday which showed the first impact on prices from the war in the Middle East. Factory gate prices also rose sharply and by much more than expected, the figures from the Office for National Statistics showed. **(Reuters)**

Trump Extends Iran Ceasefire, Blockade as Peace Talks Stumble

US President Donald Trump indefinitely extended a ceasefire with Iran just before its expiration, while maintaining a naval blockade of the Strait of Hormuz after planned peace talks between the two sides fell apart. **(Bloomberg)**

Commodities

Saudi oil exports rise to 7.28M bpd in February: JODI

Saudi Arabia's crude oil exports increased 4.1% month-on-month (MoM) to 7.28 million barrels per day (bpd) in February 2026, according to the Joint Organizations Data Initiative (JODI). Year-on-year (YoY), crude exports rose 21.5%. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics

		20-Apr	21-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2356	2351	-0.2%	-1.5%	5.5%
Value	mn	5105	5579	9.3%	-3.0%	7.3%
Volume	mn	256	274	6.9%	-5.1%	8.8%
NOMU						
Market Cap	mn	7376	7375	0.0%	1.4%	-2.8%
Value	mn	24.9	31.5	26.6%	32.1%	60.7%
Volume	mn	2.4	2.5	6.3%	1.9%	14.9%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
BAAN	2	0.18	10%
SAUDI GERMAN HEALTH	40.32	1.82	5%
SHL	15.63	0.62	4%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SABIC AGRI-NUTRIENTS	150	-6	-4%
CHEMANOL	8.4	-0.3	-3%
NICE ONE	14.88	-0.44	-3%

Source: Tadawul

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MUFEED	41.98	3.48	9%
AQASEEM	4.38	0.28	7%
FIRST AVENUE	6.69	0.29	5%

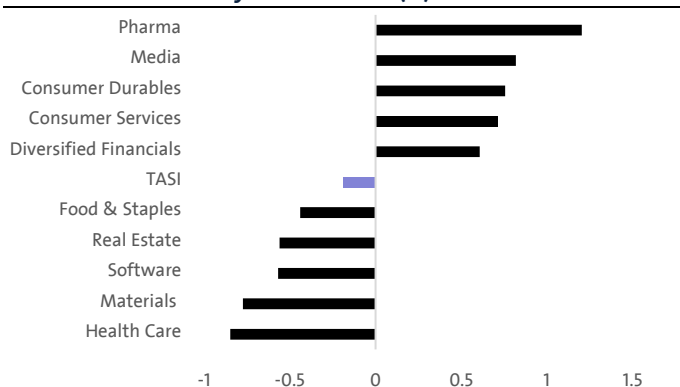
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
KNOWLEDGENET	15.1	-1.1	-7%
MOLAN	1.32	-0.08	-6%
GROUP FIVE	53.8	-3.2	-6%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SADR	2.81	0.05	2%	22.6
BAAN	2	0.18	10%	20.9
AMERICANA	1.89	0.01	1%	15.8
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	71.7	0.3	0%	951
SNB	40.7	-1	-2%	443
SAUDI ARAMCO	27.16	-0.04	0%	256

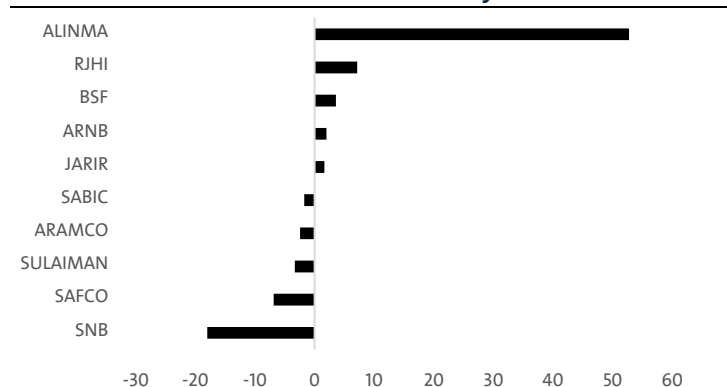
Source: Tadawul

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
22-April	TADAWUL GROUP	Eligibility of Cash Dividend
23-April	THEEB	Eligibility of Cash Dividend
26-April	MAHARAH	Eligibility of Cash Dividend
26-April	ALSAIF GALLERY	Eligibility of Cash Dividend
29-April	SAUDI CEMENT	Eligibility of Cash Dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
28-Apr	U.S.	Consumer Confidence	Apr	87.8	91.0

Source: Bloomberg, Investing.Com

Daily Market Report

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