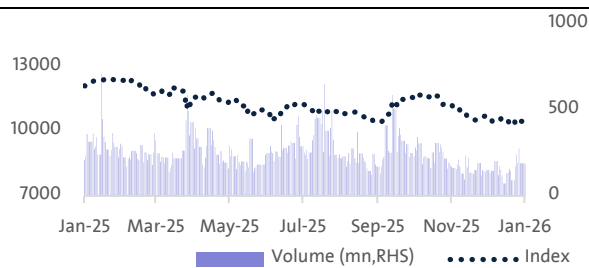


Daily Market Report

Key Indices-Return and Valuation

	22-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11245	-0.9%	-0.3%	7%	15.2	1.6
NOMU	22861	0.0%	1.4%	-3%	0.0	1.6
S&P500	7138	1.0%	8.6%	4%	21.8	5.5
Dow Jones	49490	0.7%	6.3%	3%	13.3	5.7
FTSE 100	10476	-0.2%	1.1%	5%	13.3	2.4
EuroStoxx50	5906	-0.4%	3.0%	2%	15.7	2.5
Nikkei225	59586	0.4%	10.9%	18%	23.9	2.8
MSCI EM	1607	-0.5%	10.3%	14%	12.6	2.4
SHCOMP	4106	0.5%	4.0%	3%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
22-Apr	76	176	17	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	22-Apr	Δ bps	YTD Av	22-Apr	Δ bps	YTD Av
1M	4.62	-10.3	5.6	3.65	0.0	4.3
3M	4.80	-3.1	5.4	3.67	0.2	4.3
6M	5.24	26.1	5.5	3.67	0.9	4.2
12M	4.78	8.4	5.2	3.65	1.3	4.0

Commodities

	Unit	22-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	97	5.7	135	60	-2.9
Brent	USDbbbl	102	3.5	118	59	-3.6
Gold	USDOz	4756	-0.6	5502	3171	-14.5
Silver	USDOz	78	1.3	117	32	-27.6
Aluminum	USDton	3671	1.8	3687	2347	-7.4
Copper	USDton	13275	-0.1	13952	9185	-9.7

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

Car rental contracts rise 7% to 1.6M in Q1 2026

The Transport General Authority (TGA) said it issued more than 1.6 million car rental contracts for individuals in the first quarter of 2026. The sector recorded 7% year-on-year (YoY) growth, with Riyadh accounting for the largest share of total contracts at 31.9%, followed by Makkah (25.5%). **(Argaam)**

Sumou to manage infrastructure development for Riyadh land portfolio

Sumou Real Estate Co. said it signed an agreement to manage infrastructure development for land plots in Riyadh's Al Qadisiyah, Al Rimal, and Al Janadriyah districts, covering a total area of 1.83 million square meters, according to a statement to Tadawul. The agreement was signed with Al-Mashariq Al-Arabiya Investment, a real estate fund managed by ANB Capital. The 36-month contract starts from the signing date, with Sumou set to receive 10% of the project's development costs. **(Argaam)**

Dallah acquires remaining 2.59% stake in Al-Ahsa unit

Dallah Healthcare Co. said it completed the acquisition of the remaining 2.59% stake in Al-Ahsa Medical Services Co. (Dallah's Al-Ahsa Hospital), bringing its ownership to 100%, according to a statement to Tadawul. **(Argaam)**

Saudi Darb wins preliminary ruling for SAR 69.2M compensation from ex-board

Saudi Darb Investment Co. (formerly Al-Baha Investment) received preliminary rulings in its favor from the Committee for the Resolution of Securities Disputes (CRSD), ordering former board members, jointly liable, to pay around SAR 68.7 million. In a statement to Tadawul, the company said the ruling also includes SAR 500,000 in legal fees, while other claims were dismissed. **(Argaam)**

Global

Japan's factory activity expands at strongest pace in 4 years, PMI shows

Japan's manufacturing activity expanded at its strongest pace in four years in April as firms boosted production over concerns about potential supply shortages due to rising tensions in the Middle East, a private-sector survey showed on Thursday. **(Reuters)**

Fed rate cut pushed back to late 2026 on war-related inflation risks

The U.S. Federal Reserve will wait at least six months before cutting interest rates this year, according to a Reuters poll of economists, as war-driven energy shocks reignite already-elevated inflation. The nearly two-month war in the Middle East has led to soaring fuel prices, eroding consumer confidence to a record low and wiping out market pricing for rate cuts. **(Reuters)**

UK consumers turn gloomiest about economy since records began in 1978

British consumers are gloomier about the economy than at any time since records began in 1978, according to a survey published on Wednesday that showed the Iran war and soaring oil prices are taking a heavy toll on British households. The Economic Optimism Index of market research firm Ipsos, measuring the gap between those who are optimistic about the economy and those who are pessimistic, fell to a record low of -72 this month. **(Reuters)**

Commodities

Oil gains on lack of progress on US-Iran talks, Hormuz shipping still disrupted

Oil prices extended their gains on Thursday, rising more than \$1 in the wake of stalled peace talks between Iran and the United States and as both nations maintained restrictions on the flow of trade through the Strait of Hormuz. Brent crude futures <LCOc1, opens new tab> rose \$1.26, or 1.2%, to \$103.17 a barrel at 0630 GMT, after settling above \$100 for the first time in more than two weeks on Wednesday. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

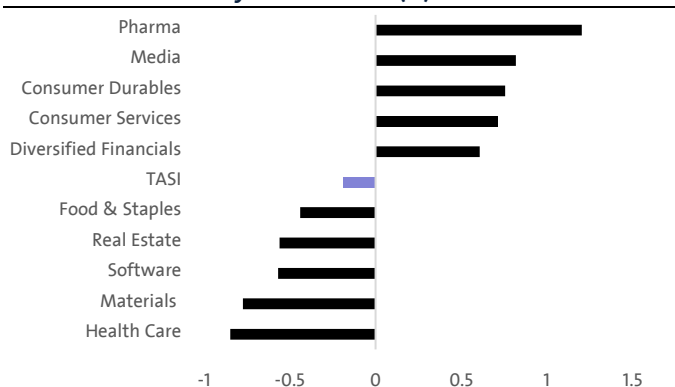
		21-Apr	22-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2351	2330	-0.9%	-2.4%	4.5%
Value	mn	5579	4995	-10.5%	-11.9%	-3.7%
Volume	mn	274	278	1.6%	-3.5%	10.4%
NOMU						
Market Cap	mn	7375	7375	0.0%	1.4%	-2.8%
Value	mn	31.5	15.7	-50.2%	-30.1%	-19.0%
Volume	mn	2.5	2.1	-18.1%	-14.8%	-5.5%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
JAHEZ	13.94	1.26	10%
TANMIAH	65.7	4.3	7%
ENAYA	9.18	0.55	6%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALDAWAA	49.36	-3.09	-6%
ADVANCED	26.98	-1.16	-4%
ALBILAD	26.02	-1.02	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
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
29-April	RIYADH BANK	Earnings call

Source: Argaam, GSTAT

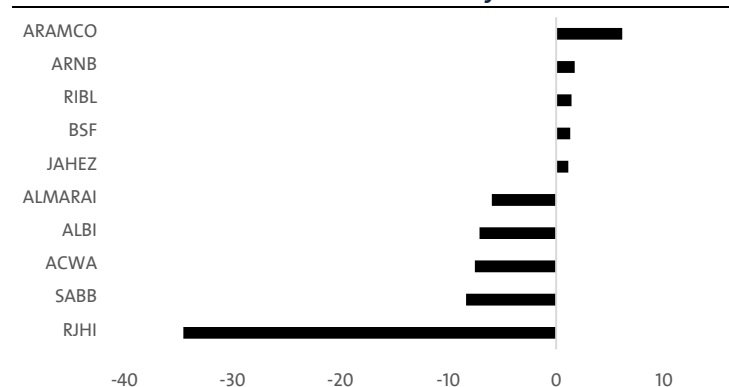
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
LANA	3.31	0.76	30%
TAQAT	12.2	0.8	7%
NGDC	30.44	1.74	6%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
NAAS PETROL	31	-3	-9%
FOOD GATE	23	-2	-8%
MUNAWLA	21.81	-1.74	-7%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BAAN	1.98	-0.02	-1%	19.9
JAHEZ	13.94	1.26	10%	14.5
ALWASAIL INDUSTRIAL	3.06	0.07	2%	14.1
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	70.25	-1.45	-2%	447
SAUDI ARAMCO	27.26	0.1	0%	261
SNB	40.52	-0.18	0%	233

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
29-Apr	U.S.	Durable Goods Orders	Apr	-1.1%	-0.5%

Source: Bloomberg, Investing.Com

Daily Market Report

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