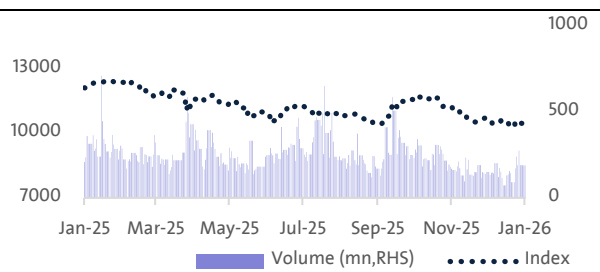


Daily Market Report

Key Indices-Return and Valuation

	26-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11122	0.1%	-1.4%	5%	15.0	1.6
NOMU	22795	-0.2%	1.1%	-3%	0.0	1.6
S&P500	7165	0.8%	9.0%	5%	21.9	5.5
Dow Jones	49231	-0.2%	5.7%	2%	13.1	5.7
FTSE 100	10379	-0.7%	0.1%	5%	13.1	2.4
EuroStoxx50	5883	-0.2%	2.6%	2%	15.6	2.5
Nikkei225	59716	1.0%	11.1%	19%	23.9	2.8
MSCI EM	1610	0.7%	10.5%	15%	12.3	2.4
SHCOMP	4080	-0.3%	3.3%	3%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
26-Apr	122	135	13	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	26-Apr	Δ bps	YTD Av	24-Apr	Δ bps	YTD Av
1M	4.65	3.2	5.6	3.65	0.3	4.3
3M	4.76	-4.3	5.4	3.67	-0.1	4.3
6M	5.25	1.0	5.5	3.68	-0.1	4.2
12M	4.87	9.0	5.2	3.69	0.5	4.0

Commodities

	Unit	24-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	101	1.1	135	60	-3.3
Brent	USDbbbl	105	0.2	118	59	-4.1
Gold	USDOz	4680	-0.4	5502	3171	-14.8
Silver	USDOz	76	0.4	117	32	-28.3
Aluminum	USDton	3669	-0.6	3692	2354	-7.8
Copper	USDton	13295	0.3	13952	9185	-10.0

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

Dar Albalad IPO price range on TASI set at SAR 9.25–9.75/share

Dar Albalad for Business Solutions set the price range for its initial public offering (IPO) at SAR 9.25 to SAR 9.75 per share, AlJazira Capital said in a Tadawul statement today, April 26. AlJazira Capital, acting as financial adviser, bookrunner and underwriter, is managing the potential offering alongside Emirates NBD Capital Saudi Arabia. **(Argaam)**

Diriyah awards SAR 1.84B contract for Contemporary Art Museum

Diriyah Co. announced the award of a SAR 1.84 billion contract for the construction of the Saudi Arabia Museum of Contemporary Art (SAMoCA) to a consortium comprising Hassan Allam Construction Saudi and Albawani Co. The museum will be located near the Grand Boulevard in Diriyah, spanning a total area of nearly 45,252 square meters. **(Argaam)**

Asas Makeen estimates Jada Al-Huda contract value at SAR 98.8M

Asas Makeen Real Estate Development and Investment Co. signed an addendum to its contract with First Avenue for Real Estate Development Co. for the Jada Al-Huda residential project in Riyadh, following the completion of final engineering designs and the receipt of required regulatory approvals. In a statement to Tadawul, the company said the addendum sets the estimated contract value at SAR 98.76 million, inclusive of VAT. **(Argaam)**

Fesh Fash gets CMA nod on 75% capital increase via bonus issue

Fesh Fash gets CMA nod on 75% capital increase via bonus issue The Capital Market Authority (CMA) granted Fesh Fash Snack Food Production Co. the approval to increase its capital from SAR 11.3 million to SAR 19.78 million. **(Argaam)**

Saudi Re completes surplus distribution, reverses SAR 53.5M

Saudi Reinsurance Co. (Saudi Re) said it completed procedures to implement its reinsurance surplus distribution policy, resulting in the reversal of an accumulated surplus balance of SAR 53.46 million as of Dec. 31, 2025 **(Argaam)**

Global

Bank of England to keep rates on hold while it gauges impact of Iran war

The Bank of England will keep interest rates on hold this week and try to look ahead to the damage building up for Britain's economy from the Iran war, while investors will be watching for any signs it is moving towards raising rates. The BoE kept borrowing costs on hold in March as it waited to see the extent of the inflationary and growth hits from the conflict. With uncertainty still high, another no-change decision is expected on Thursday. **(Reuters)**

China's industrial profit growth quickens even as Iran war heightens risks

Profits at China's industrial firms grew at their quickest pace in half a year last month, adding to broader signs of an uneven economic recovery in the first quarter as policymakers brace for the impact of the Middle East war. **(Reuters)**

Commodities

Iran war hands OPEC's swing producer crown to America

The U.S. has stepped in to shield the global economy from the oil crunch triggered by the Iran war by boosting exports, selectively easing sanctions and tapping strategic reserves. The conflict may be denting Washington's standing in some quarters, but it is also cementing its transformation into the world's dominant energy superpower. released footage of commandos boarding a cargo ship in the Strait of Hormuz, and a lack of progress in re-opening the key waterway. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

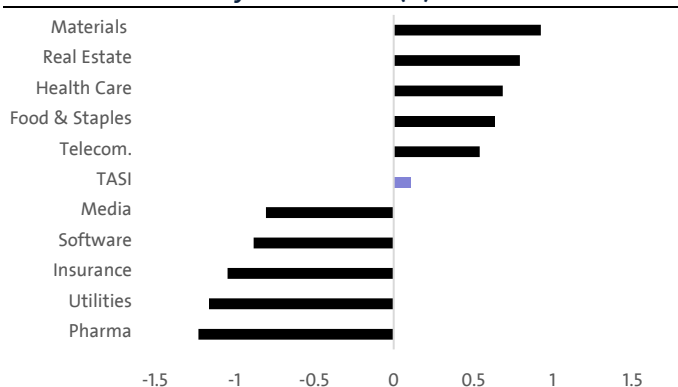
		23-Apr	26-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2302	2305	0.1%	-3.4%	3.4%
Value	mn	6029	6029	0.0%	4.6%	15.4%
Volume	mn	327	216	-34.1%	-23.9%	-14.4%
NOMU						
Market Cap	mn	7375	7372	0.0%	1.3%	-2.8%
Value	mn	15.7	21.2	35.3%	-6.4%	9.1%
Volume	mn	2.1	1.8	-11.9%	-23.4%	-16.4%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
PETRO RABIGH	12.65	1.15	10%
YANSAB	35.3	2.3	7%
ALUJAIN	28.7	1.54	6%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
BAAN	1.94	-0.16	-8%
SAUDI DARB	2.18	-0.1	-4%
NADEC	16.15	-0.72	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
29-April	SAUDI CEMENT	Eligibility of Cash Dividend
29-April	Americana	General Meeting
30-April	DAR AL BALAD	End of IPO book building
30-April	SAMA	Monthly Bulletin
30-April	LAMASAT	Eligibility of Cash Dividend

Source: Argaam, GSTAT

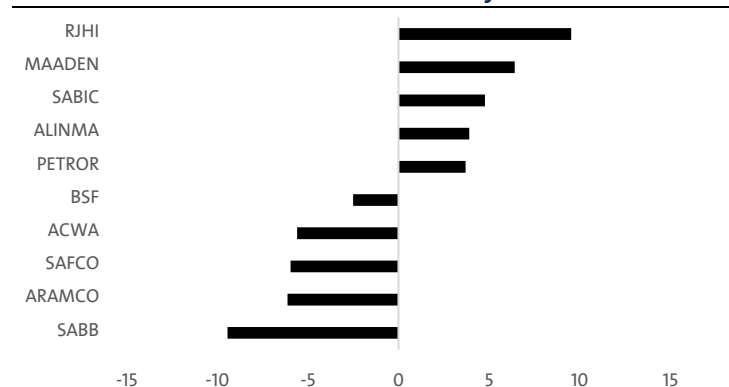
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MAYAR	1.36	0.11	9%
MUNAWLA	23.16	1.81	8%
RAWASI	3.3	0.25	8%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
MULKIA	38.04	-3.96	-9%
NGDC	27.6	-2.84	-9%
ADEER	91	-4.65	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BAAN	1.94	-0.16	-8%	25.4
SAUDI KAYAN	5.32	0.2	4%	19.3
AMERICANA	1.88	0.01	1%	15.3
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	69.1	0.4	1%	269
SABIC AGRI-NUTRIENTS	135.8	-5.2	-4%	173
SAUDI ARAMCO	27.12	-0.1	0%	136

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
28-Apr	U.S.	Consumer Confidence	Apr	87.8	91.0
29-Apr	U.S.	Durable Goods Orders	Apr	-1.1%	-0.5%
30-Apr	C.Y.	Manufacturing PMI	Apr	50.1	49.0
30-Apr	U.K.	Interest Rate Decision	Apr	3.75%	3.75%
30-Apr	E.U.	Interest Rate Decision	Apr	2.15%	2.15%

Source: Bloomberg, Investing.Com

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