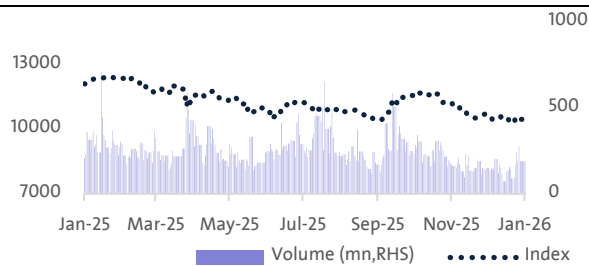


Daily Market Report

Key Indices-Return and Valuation

	27-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11169	0.4%	-1.0%	6%	15.0	1.6
NOMU	22949	0.7%	1.8%	-2%	0.0	1.6
S&P500	7174	0.1%	9.1%	5%	21.9	5.6
Dow Jones	49168	-0.1%	5.6%	2%	13.0	5.6
FTSE 100	10321	-0.6%	-0.4%	4%	13.0	2.3
EuroStoxx50	5860	-0.4%	2.2%	1%	15.5	2.5
Nikkei225	60537	1.4%	12.6%	20%	24.1	2.8
MSCI EM	1630	1.2%	11.8%	16%	12.4	2.4
SHCOMP	4086	0.2%	3.5%	3%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
27-Apr	182	74	14	2.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	27-Apr	Δ bps	YTD Av	27-Apr	Δ bps	YTD Av
1M	4.68	2.4	5.6	3.65	0.3	4.3
3M	4.72	-3.2	5.4	3.67	-0.1	4.3
6M	5.20	-5.1	5.5	3.68	-0.1	4.2
12M	4.85	-2.7	5.2	3.69	0.5	4.0

Commodities

	Unit	27-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	100	-0.7	135	60	-3.4
Brent	USDbbbl	108	2.8	118	59	-4.3
Gold	USDOz	4702	0.5	5502	3171	-15.0
Silver	USDOz	76	-0.3	117	32	-28.5
Aluminum	USDton	3644	-0.7	3692	2354	-8.0
Copper	USDton	13271	-0.2	13952	9185	-10.1

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)**

SGS wins SAR 314.9M contract with Riyadh Airports

Saudi Ground Services Co. (SGS) won a SAR 314.9 million contract with Riyadh Airports Co. for the operation and maintenance of passenger boarding bridges and related services at King Khalid International Airport (KKIA) in Riyadh. **(Argaam)**

MSCI expects no additions to Saudi MSCI EM

MSCI is set to conduct its next index review on May 12, 2026, anticipating no new additions to the Saudi MSCI EM Standard. "However, SAL Logistics and Mouwasat remain primary candidates for deletion," the global index provider noted. **(Argaam)**

Edarat finalizes steps to acquire 40% stake in MIS subsidiary

Al Moammar Information Systems Co. (MIS) and Edarat Communication and Information Technology Co. announced completing regulatory procedures for Edarat's acquisition of a 40% stake in MIS subsidiary National Excellence Data Centers Co. **(Argaam)**

SALIC raises stake in Olam Agri to 80% in SAR 7B deal

SALIC, a subsidiary of the Public Investment Fund (PIF), increased its stake in Olam Agri Holdings to 80.01% after completing the acquisition of 44.58% for \$1.88 billion (nearly SAR 7 billion). The move aligns with SALIC's ambitious plans to strengthen its investment portfolio and expand its global footprint, it said in a statement. **(Argaam)**

Global

Fed likely to hold rates steady as Powell prepares for possible swan song

Federal Reserve policymakers will gather in Washington this week in what may be Jerome Powell's last meeting as head of the U.S. central bank, with energy prices still elevated and the Iran war at a standstill and likely to prolong uncertainty about the economic and monetary policy outlook. **(Reuters)**

BOJ keeps rates steady but hawkish split points to June hike

The Bank of Japan kept interest rates steady on Tuesday but three of its nine-member board proposed hiking borrowing costs, signalling policymakers' concerns over inflationary pressures from the Middle East conflict. **(Reuters)**

Easter discounts lower UK shop price inflation in April, BRC survey shows

Easter promotions on chocolate eggs, home renovation materials and clothing helped lower shop price inflation in April, offering households some respite ahead of an expected further rise in prices caused by the Iran war. **(Reuters)**

Commodities

Brent crude gains over 1% to cross \$107

Oil prices rose in early session today, April 27, as the stalled peace talks between the US and Iran fueled continued concerns about energy exports from the Middle East. Brent crude was trading up 1.6% at \$107 a barrel, at 08:16 am Makkah time. West Texas Intermediate (WTI) rose 1.35% to \$95.67 a barrel. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics

		26-Apr	27-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2305	2315	0.4%	-3.0%	3.8%
Value	mn	3594	6086	69.3%	7.5%	16.9%
Volume	mn	216	373	73.1%	26.2%	46.2%
NOMU						
Market Cap	mn	7354	7403	0.7%	1.8%	-2.4%
Value	mn	22.8	23.1	1.6%	1.4%	18.3%
Volume	mn	3.1	2.8	-9.3%	14.3%	28.6%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
PETRO RABIGH	13.91	1.26	10%
SAUDI KAYAN	5.85	0.53	10%
YANSAB	38	2.7	8%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ABO MOATI	42.92	-1.82	-4%
TADAWUL GROUP	136	-5.2	-4%
SPM	58.35	-2.1	-3%

Source: Tadawul

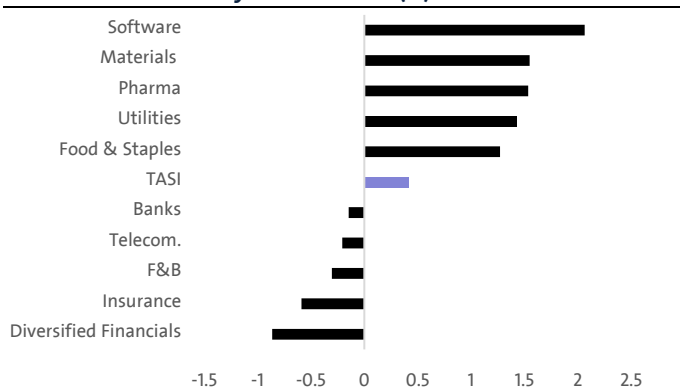
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NBM	44.06	5.94	16%
MULKIA	41.3	3.26	9%
TIME	33	2	6%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
NAF	32.02	-6.88	-18%
THARWAH	29.12	-2.88	-9%
SPC	18.84	-1.66	-8%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.88	0	0%	75.8
SAUDI KAYAN	5.85	0.53	10%	41.4
BATIC	2.28	0.04	2%	18.6
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	69.1	0	0%	387
SAUDI ARAMCO	27.26	0.14	1%	318
SABIC	61.2	2.8	5%	263

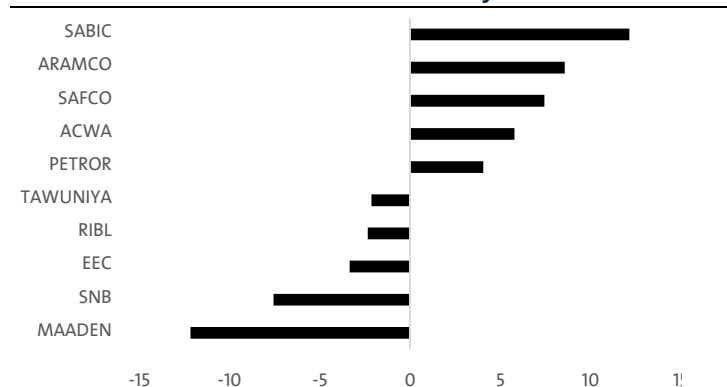
Source: Tadawul

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
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

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

Daily Market Report

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