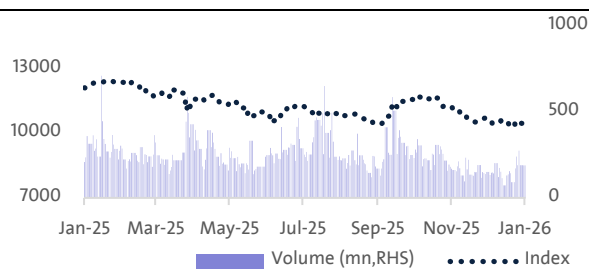


Daily Market Report

Key Indices-Return and Valuation

	28-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11180	0.1%	-0.9%	6%	15.0	1.6
NOMU	22889	-0.3%	1.5%	-3%	0.0	1.6
S&P500	7139	-0.5%	8.6%	4%	21.7	5.6
Dow Jones	49142	-0.1%	5.5%	2%	13.1	5.6
FTSE 100	10333	0.1%	-0.3%	4%	13.1	2.3
EuroStoxx50	5836	-0.4%	1.8%	1%	15.5	2.5
Nikkei225	59917	-1.0%	11.5%	19%	24.1	2.8
MSCI EM	1617	-0.8%	10.9%	15%	12.5	2.4
SHCOMP	4079	-0.19%	3.3%	3%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
28-Apr	84	178	8	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	28-Apr	Δ bps	YTD Av	28-Apr	Δ bps	YTD Av
1M	4.63	-1.8	5.6	3.66	0.1	4.3
3M	4.75	-0.8	5.4	3.67	-0.1	4.3
6M	5.19	-6.0	5.5	3.67	-0.8	4.2
12M	4.86	-1.2	5.2	3.68	-1.7	4.0

Commodities

	Unit	28-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	103	3.4	135	60	-3.4
Brent	USDbbbl	111	2.8	118	59	-4.3
Gold	USDOz	4611	-1.9	5502	3171	-15.0
Silver	USDOz	73	-3.2	117	32	-28.5
Aluminum	USDton	3595	-1.4	3692	2354	-8.0
Copper	USDton	12990	-2.1	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

CMA approves WSM's request to offer debt instruments

The Capital Market Authority (CMA) approved WSM for Information Technology Co.'s request to register and publicly offer debt instruments under an issuance program worth no more than SAR 500 million. **(Argaam)**

Aldawaa unable to post 2025 financials within specified deadline

Aldawaa Medical Services Co. is unable to publish its 2025 financial results within the previously announced timeframe ending today, April 28. In a statement to Tadawul, the company said the delay is mainly due to the ongoing completion of audit procedures, including work related to the current period as well as prior periods, noting that the financial statements will be disclosed once the audit process is finalized. **(Argaam)**

WAJA wins SAR 10.6M project from NDF

WAJA Co. was awarded a project by the National Development Fund (NDF) valued at SAR 10.6 million, inclusive of VAT. In a statement to Tadawul, the company said the project involves the development and fit-out of office spaces, meeting rooms, and a restaurant on the first floor of the fund's headquarters at the King Abdullah Financial District (KAFFD). **(Argaam)**

Global

China's factory activity set to expand at a slower clip in April: Reuters poll

China's factory activity likely grew at a slower pace in April as rising cost pressures stemming from the Middle East conflict test Beijing's reliance on manufacturing to underpin economic growth. The official manufacturing purchasing managers' index (PMI) is expected to drop to 50.1 from 50.4 in March, according to the median forecast in a Reuters poll of 27 economists. **(Reuters)**

US consumer confidence unexpectedly improves, but higher gasoline prices still a worry

U.S. consumer confidence unexpectedly edged higher in April amid a rally in share prices following a ceasefire in the war with Iran and improved perceptions of the labor market, helping to ease households' financial worries for now. Despite the rise in confidence to a four-month high, the survey from the Conference Board on Tuesday showed higher gasoline prices stemming from the U.S.-Israeli conflict with Iran remained a source of concern for consumers. **(Reuters)**

Commodities

Oil slips as market digests UAE exit from OPEC, supply concerns linger

Oil prices eased on Wednesday from a multi-day rally as investors digested the ramifications of the United Arab Emirates' surprise decision to quit OPEC, though supply disruptions from the stalemated Iran war support the market. Brent crude futures for June dipped 1 cent to \$111.25 a barrel by 0413 GMT, having climbed for the previous seven sessions. The June contract expires on Thursday and the more active July contract down 28 cents at \$104.12. **(Reuters)**

API says US gasoline inventories fall 8.5M barrels

US gasoline inventories fell sharply last week, along with a slump in crude oil and refined product stocks, latest data from the American Petroleum Institute (API) showed. Commercial crude inventories fell by 1.79 million barrels in the week ended April 24, contrary to expectations for a 300,000-barrel increase, API said in a report issued on April 28. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics

		27-Apr	28-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2315	2317	0.1%	-2.9%	3.9%
Value	mn	6086	5350	-12.1%	-4.6%	2.9%
Volume	mn	373	313	-16.2%	6.5%	22.6%
NOMU						
Market Cap	mn	7403	7384	-0.3%	1.5%	-2.7%
Value	mn	23.1	24.6	6.2%	7.0%	25.1%
Volume	mn	2.8	3.9	35.4%	48.0%	71.7%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
UACC	13.09	1.19	10%
CHEMICAL	8.64	0.5	6%
UCIC	25.84	1.26	5%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
LEEJAM SPORTS	80	-8.85	-10%
EIC	17.1	-0.67	-4%
ABO MOATI	41.34	-1.58	-4%

Source: Tadawul

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NGDC	29.9	2.3	8%
ALBATTAL FACTORY	15.27	0.93	6%
SIGN WORLD	14.2	0.7	5%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
AQASEEM	3.5	-0.65	-16%
NASEEJ TECH	39.02	-3.96	-9%
JAMJOOM FASHION	123.8	-11.3	-8%

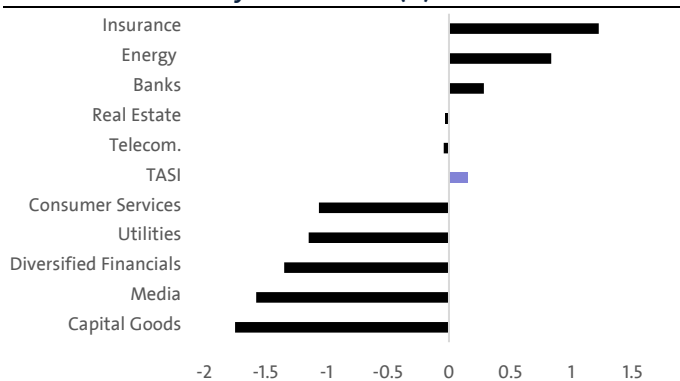
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.87	-0.01	-1%	33.2
CHEMICAL	8.64	0.5	6%	29.6
SAUDI KAYAN	5.8	-0.05	-1%	29.0

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	69.1	0	0%	377
SAUDI ARAMCO	27.46	0.2	1%	294
CHEMICAL	8.64	0.5	6%	253

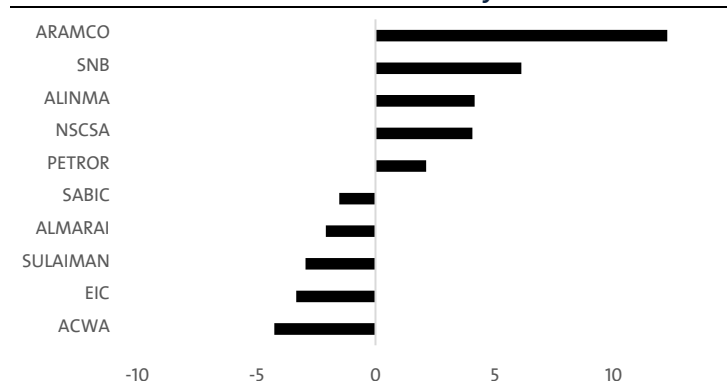
Source: Tadawul

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
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%
30-Apr	U.S.	Manufacturing Purchasing Managers	Apr	52.3	52.4

Source: Bloomberg, Investing.Com

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