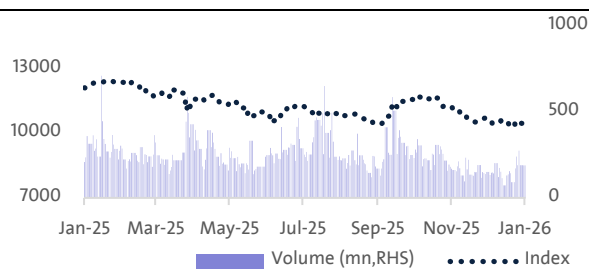


Daily Market Report

Key Indices-Return and Valuation

	03-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11268	-0.1%	-0.1%	7%	15.5	1.5
NOMU	22552	0.0%	0.0%	-4%	0.0	1.5
S&P500	6583	0.0%	0.1%	-4%	20.3	5.1
Dow Jones	46505	0.0%	-0.1%	-3%	13.5	5.3
FTSE 100	10436	0.0%	0.7%	5%	13.5	2.4
EuroStoxx50	5693	0.0%	-0.7%	-2%	15.3	2.4
Nikkei225	53123	1.3%	-1.1%	6%	21.6	2.5
MSCI EM	1441	0.5%	-1.1%	3%	12.0	2.2
SHCOMP	3880	-1.00%	-1.7%	-2%	15.9	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
02-Apr	96	154	19	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	02-Apr	Δ bps	YTD Av	03-Apr	Δ bps	YTD Av
1M	4.75	3.4	5.6	3.66	-0.4	4.3
3M	4.94	9.1	5.4	3.67	-0.3	4.3
6M	5.28	9.8	5.5	3.69	-0.2	4.2
12M	4.82	-5.0	5.2	3.70	-0.4	4.0

Commodities

	02-Apr		Δ	52-week		YTD Av
	Unit	USD		Hi	low	
Arab Light	USDbbbl	112	8.7	135	60	-0.9
Brent	USDbbbl	109	7.8	118	59	-1.4
Gold	USDOz	4626	-2.0	5502	3003	-13.0
Silver	USDOz	73	-2.8	117	30	-24.8
Aluminum	USDton	3540	-1.6	3596	2275	-5.4
Copper	USDton	12236	-1.1	13952	8590	-8.2

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

April subscription to open for Sah Sukuk with 4.50% return on April 4

Subscription for the April issuance of Sah Sukuk, a Shariah-compliant government bond for individuals, will open tomorrow, April 5. The sukuk are issued by the Saudi government through the Ministry of Finance and arranged by the National Debt Management Center (NDMC). The return rate was set at 4.50%, with allocation scheduled for April 14. The redemption period will take place from April 19 to 21, and redemption payments will be disbursed on April 26. **(Argaam)**

Batic refrigeration unit buys 90 MAN trucks to boost efficiency

Batic Investments and Logistics Co.'s wholly-owned subsidiary, Saudi Transport and Investment Co. (Mubarrad), purchased 90 MAN 20-ton truck heads (2026 model) at a value equivalent to approximately 10% of the company's net assets. The contract was concluded with Haji Husein Alireza & Co. Ltd. **(Argaam)**

CMA nods to Seera's 8.65% planned capital cut

The Capital Market Authority (CMA) announced its approval of Seera Holding Group's planned capital reduction from SAR 3 billion to SAR 2.74 billion. Consequently, the number of shares will be cut from 300 million to 274.05 million. The approval is conditional on the extraordinary general meeting's (EGM) nod and completion of the necessary regulatory procedures. **(Argaam)**

Naseej Tech awarded SAR 46.7M project in Oman

Naseej for Technology Co. (Naseej Tech) won a contract with Oman's SAH – SML Joint Venture Co. LLC for Sayyid Tarik Bin Taimur Cultural Complex Project, at a total value of OMR 4.79 million (or SAR 46.7 million), inclusive of value added tax (VAT), based on the Saudi Central Bank's (SAMA) exchange rate of SAR 9.74 per OMR 1. **(Argaam)**

NCLE advances new TNS complex opening, delays North Obhur project

National Company for Learning and Education (NCLE) brought forward the opening of its Tarbyh Namouthajiyah School (TNS) complex in Dhahrat Laban, Riyadh, to the 2026/2027 academic year, moving the start date up from 2027/2028, citing faster construction progress. **(Argaam)**

Global

US labor market posts largest jobs gain in 15 months, but clouds brewing from Iran war

U.S. job growth rebounded more than expected in March as a strike by healthcare workers ended and temperatures warmed up, but downside risks for the labor market are mounting from a war with Iran that has no clear end in sight. The biggest increase in nonfarm payrolls in 15 months, and also the largest since President Donald Trump returned to the White House, followed a sharp decline in February, the Labor Department's closely watched employment report showed **(Reuters)**

Stronger, broader hiring could ease Fed job market worries

Hiring that strengthened and broadened in March will likely cement the U.S. Federal Reserve's plans to keep interest rates on hold for the foreseeable future, easing concerns about a weakening labor market and keeping policymakers focused on whether rising energy prices threaten higher inflation. **(Reuters)**

Commodities

Oil pipeline at Russia's Primorsk damaged in drone attack, governor says

A portion of an oil pipeline at Russia's Baltic Sea port of Primorsk has been damaged in a Ukrainian drone attack, local governor Alexander Drozdenko said in a post on the Telegram messaging app on Sunday. He said no one was injured in the attack. The pipeline was shut and the fire was safely burning out **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		01-Apr	02-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2387	2385	-0.1%	0.4%	-2.3%
Value	mn	6481	5700	-12.0%	23.1%	20.7%
Volume	mn	321	297	-7.5%	42.6%	25.7%
NOMU						
Market Cap	mn	7274	7275	0.0%	0.0%	-4.1%
Value	mn	28.9	26.7	-7.6%	118.6%	40.0%
Volume	mn	3.0	1.7	-42.6%	263.8%	-26.2%

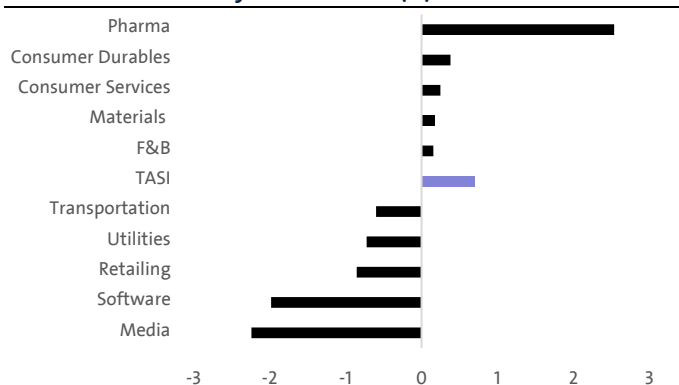
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SSP	48.64	4.42	10%
EMAAR EC	11.78	1.07	10%
MESC	28	2.54	10%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
RAYDAN	17.69	-1.31	-7%
SPCC	22.17	-0.9	-4%
SALEH ALRASHED	66.05	-2.65	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
05-April	EPCCO	Eligibility of Cash Dividend
05-April	PMI-March	Riyad Bank Composite PMI
05-April	SMASCO	Eligibility of Cash Dividend
06-April	JARIR	Eligibility of Cash Dividend
07-April	AVALON PHARMA	Cash dividends

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
WAJD LIFE	6	0.45	8%
YAQEEN	10.1	0.7	7%
GROUP FIVE	44.98	2.88	7%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
TIME	32.1	-5	-13%
ALHASOOB	36.92	-4.08	-10%
NGDC	26.6	-2.9	-10%

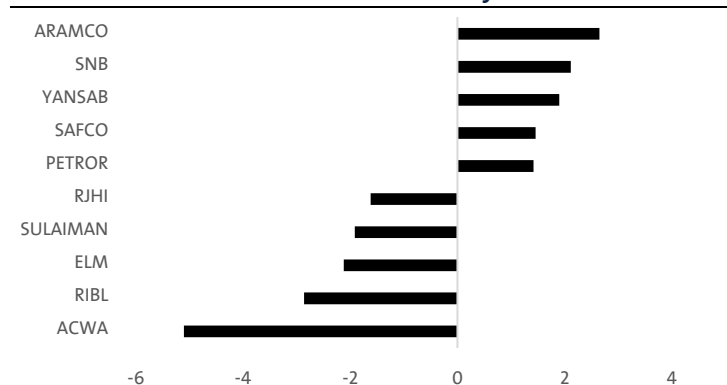
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.9	0	0%	26.1
APC	6.15	0.41	7%	19.8
SAUDI ARAMCO	27.6	0.04	0%	15.8

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27.6	0.04	0%	436
ALRAJHI	106.4	-0.1	0%	308
SABIC	59.55	0	0%	178

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
06-Apr	U.S.	ISM Non-Manufacturing Prices	Mar	68.3	66.6
07-Apr	E.U.	HCOB Eurozone Services PMI	Mar	51.1	51.9
08-Apr	U.S.	Crude oil inventory	Mar	1.800M	6.926M
09-Apr	U.S.	30-Year Bond Auction			4.750%
10-Apr	U.S.	Core Consumer Price Index (CPI)	Mar	0.2%	0.3%

Source: Bloomberg, Investing.Com

Daily Market Report

Contact Us:**Alinma Capital Company****Research Department (Sell-Side)**Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh
55560

Saudi Arabia

Phone: 011-2185555 =86309

E-mail: research@alinmacapital.com**Disclaimer**

The published reports are for general information purposes to present a view on the company/economic sector/economic subject under research, and should not be considered a recommendation to buy/sell/hold for any security or any other assets. This report does not take into consideration the specific financial position of every investor and/or his/her risk appetite in relation to investing in the security or any other assets, and hence, may not be suitable for all clients depending on their financial position and their ability and willingness to undertake risks. It is advised that every potential investor seek professional advice from several sources concerning investment decision and should study the impact of such decisions on his/her financial/legal/tax position and other concerns before getting into such investments or liquidate them partially or fully. The market of securities, macroeconomic or microeconomic variables are of a volatile nature and could witness sudden changes, therefore, the investor in securities or other assets might face some unexpected risks and fluctuations. All the information, views and expectations and fair values or target prices contained in this report have been compiled or arrived at by Alinma Capital company from sources believed to be reliable, but Alinma Capital company has not independently verified the contents obtained from these sources and such information may be condensed or incomplete. Accordingly, no representation or warranty, express or implied, is made as to, and no reliance should be placed on the fairness, accuracy, completeness or correctness of the information and opinions contained in this report. Alinma Capital company shall not be liable for any loss as that may arise from the use of this report or its contents or otherwise arising in connection therewith. The past performance of any investment is not an indicator of future performance. Any financial projections, fair value estimates or price targets and statements regarding future prospects contained in this document may not be realized. The value of the security or any other assets or the return from them might increase or decrease. Any change in currency rates may have a positive or negative impact on the value/return on the securities mentioned in the report. The investor might get an amount less than the amount invested in some cases. Some securities maybe, by nature, of low volume/trades or may become like that unexpectedly in special circumstances and this might increase the risk on the investor. Some fees might be levied on some investments in securities. This report has been written by professional employees in Alinma Capital company, and they might be holding positions directly in any securities and mutual funds contained in this report during the time of publication of this report, This report has been produced independently and separately by the Research Division at Alinma Capital company and no party (in-house or outside) who might have interest whether direct or indirect have seen the contents of this report before its publishing, except for those whom corporate positions allow them to do so, and/or third-party persons/institutions who signed a non-disclosure agreement with Alinma Capital company. Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document. Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document or its subsidiaries may own securities in one or more of the aforementioned companies, and/or indirectly through funds managed by third parties. The Investment

Daily Market Report

Banking division of Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document maybe in the process of soliciting or executing fee earning mandates for companies that is either the subject of this document or is mentioned in this document. One or more of Funds managed by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document board members or executive managers could be also a board member or member of the executive management at the company or companies mentioned in this report, or their associated companies. No part of this report may be reproduced whether inside or outside the Kingdom of Saudi Arabia without the written permission by Alinma Capital company and its subsidiaries for third parties may own the securities that are the subject of this document.

Alinma Capital, a Saudi closed joint stock company under CR No. 1010269764 and the Capital Market Authority License No.37-09134.