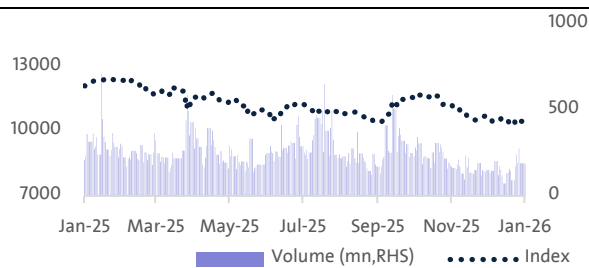


# Daily Market Report

## Key Indices-Return and Valuation

|             | 04-May* | DoD   | MTD  | YTD | P/E  | P/BV |
|-------------|---------|-------|------|-----|------|------|
| TASI        | 11188   | -0.4% | 0.0% | 6%  | 15.0 | 1.6  |
| NOMU        | 22882   | 0.0%  | 0.0% | -3% | 0.0  | 1.6  |
| S&P500      | 7230    | 0.3%  | 0.0% | 6%  | 21.7 | 5.6  |
| Dow Jones   | 49499   | -0.3% | 0.0% | 3%  | 13.1 | 5.7  |
| FTSE 100    | 10364   | -0.1% | 0.0% | 4%  | 13.1 | 2.3  |
| EuroStoxx50 | 5882    | 0.0%  | 0.0% | 2%  | 15.6 | 2.5  |
| Nikkei225   | 59513   | 0.4%  | 0.0% | 18% | 23.5 | 2.8  |
| MSCI EM     | 1601    | 0.1%  | 0.0% | 14% | 3.1  | 2.4  |
| SHCOMP      | 4112    | 0.0%  | 0.0% | 4%  | 14.4 | 1.6  |

## TASI- Index and Volume Trends



## Advance to Decline Ratio

|        | Advance | Decline | Unchanged | A/D   |
|--------|---------|---------|-----------|-------|
| 04-May | 181     | 73      | 16        | 2.5:1 |

## Money Market Yields

| %   | SAIBOR |       |        | Term SOFR |       |        |
|-----|--------|-------|--------|-----------|-------|--------|
|     | 04-May | Δ bps | YTD Av | 02-May    | Δ bps | YTD Av |
| 1M  | 4.70   | 3.0   | 5.6    | 3.65      | -0.1  | 4.3    |
| 3M  | 4.69   | -0.5  | 5.4    | 3.66      | 0.1   | 4.3    |
| 6M  | 5.18   | -8.1  | 5.5    | 3.68      | 0.9   | 4.2    |
| 12M | 4.83   | -0.4  | 5.2    | 3.74      | 3.4   | 4.0    |

## Commodities

|            | Unit    | 04-May | Δ    | 52-week |      | YTD Av |
|------------|---------|--------|------|---------|------|--------|
|            |         | USD    | %    | Hi      | low  | %Δ     |
| Arab Light | USDbbbl | 123    | 16.7 | 135     | 60   | -4.4   |
| Brent      | USDbbbl | 114    | 5.8  | 118     | 59   | -5.6   |
| Gold       | USDOz   | 4568   | 0.0  | 5502    | 3171 | -15.5  |
| Silver     | USDOz   | 73     | -3.4 | 117     | 32   | -29.5  |
| Aluminum   | USDton  | 3586   | 0.0  | 3692    | 2354 | -8.7   |
| Copper     | USDton  | 12967  | 0.0  | 13952   | 9359 | -10.7  |

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

### Saudi consumer spending crosses \$39.98bln in March

Consumer spending in Saudi Arabia recorded one percent increase, reaching SR150.1 billion during March 2026 compared to SR148 billion in the same month of 2025, an increase of SR2.1 billion. **(Argaam)**

### Emaar EC awards SAR 547M infrastructure project to Nesma & Partners

Emaar The Economic City awarded on May 4 an infrastructure project within the Industrial Valley and the Special Economic Zone at King Abdullah Economic City to Nesma & Partners. **(Argaam)**

### SMASCO unit wins SAR 80.7M HRSD project

Saudi Manpower Solutions Co. (SMASCO) said its subsidiary, Saudi Logistics Services Co. (SLSC), won a project from the Ministry of Human Resources and Social Development (HRSD) valued at about SAR 80.7 million, including VAT, over two years. The project covers a framework agreement to provide and operate centers to shelter absent domestic workers and those refusing to work, the company said in a statement to Tadawul. **(Argaam)**

### CATRION extends SAR 197.4M contract with flynas

CATRION Catering Holding Co. extended its contract with flynas for the provision of performing inflight catering services and selling onboard food, beverage, and other supplies, alongside logistics services, at a provisional value of SAR 197.4 million. **(Argaam)**

### Saudi non-oil business activity returns to growth in April as demand recovers slightly

Saudi Arabia's non-oil private sector swung back to growth in April as output and new business rebounded from the Iran war disruption in March, but the related price pressures accelerated sharply and shipping problems continued to weigh, a survey showed on Tuesday. The seasonally adjusted Riyadh Bank Saudi Arabia Purchasing Managers' Index (PMI) rose to 51.5 in April from 48.8 in March. A reading above 50.0 separates growth from contraction. **(Argaam)**

## Global

### US and Iran launch new attacks as they wrestle for control of Gulf waters

The U.S. and Iran launched new attacks in the Gulf on Monday as they wrestled for control over the Strait of Hormuz with duelling maritime blockades, shaking a fragile truce. The fresh volleys of missiles and drones came after U.S. President Donald Trump launched a new effort to get stranded tankers and other ships through the strait, the vital energy-trade chokepoint that has been virtually closed since the U.S. and Israel began attacks on Iran in February, a war that has killed thousands of people across the region. **(Reuters)**

### US factory orders rise more than expected in March

New orders for U.S. factory goods rose more than expected in March, led by surging demand for electronics products amid the artificial intelligence investment boom. Factory orders were up 1.5% on the month, the biggest gain since November, from an upwardly revised 0.3% in February, the Commerce Department's Census Bureau said on Monday. **(Reuters)**

## Commodities

### Oil eases on signs US is loosening Iranian closure of Strait of Hormuz

Oil prices eased on Tuesday after climbing by as much as 6% in the previous session on signs the U.S. Navy is loosening Iran's closure of the key Strait of Hormuz waterway, potentially opening up supply from the key Middle East producing area. **(Reuters)**

## Daily Market Report

## TASI &amp; NOMU- Key Statistics

|            |     | 03-May |      | 04-May |        | Δ%    |  |
|------------|-----|--------|------|--------|--------|-------|--|
| TASI       | SAR |        |      | DoD    | MTD*   | YTD*  |  |
| Market Cap | bn  | 2320   | 2298 | -0.9%  | -0.9%  | 3.1%  |  |
| Value      | mn  | 4297   | 6082 | 41.5%  | 10.8%  | 16.2% |  |
| Volume     | mn  | 250    | 299  | 19.6%  | 5.8%   | 15.5% |  |
| NOMU       |     |        |      |        |        |       |  |
| Market Cap | mn  | 7400   | 7357 | -0.6%  | -0.3%  | -3.0% |  |
| Value      | mn  | 23.7   | 20.9 | -11.8% | -4.3%  | 6.0%  |  |
| Volume     | mn  | 6.4    | 2.5  | -60.8% | -34.1% | 9.7%  |  |

\*Average for the period, Source: Argaam

| TASI-Top Gainers | Last Price | Change |     |
|------------------|------------|--------|-----|
|                  | SAR/sh     | SAR    | %   |
| ALSAGR INSURANCE | 11.45      | 1.04   | 10% |
| AMANA INSURANCE  | 6.83       | 0.62   | 10% |
| ENAYA            | 11.09      | 0.7    | 7%  |

| TASI-Top Losers     | Last Price | Change |     |
|---------------------|------------|--------|-----|
|                     | SAR/sh     | SAR    | %   |
| SAUDI GERMAN HEALTH | 34.74      | -2.74  | -7% |
| NOFOTH              | 8          | -0.63  | -7% |
| ALMAJED OUD         | 133.6      | -9.4   | -7% |

Source: Tadawul

| NOMU-Top Gainers | Last Price | Change |     |
|------------------|------------|--------|-----|
|                  | SAR/sh     | SAR    | %   |
| DRC              | 42.86      | 6.2    | 17% |
| MAYAR            | 1.7        | 0.11   | 7%  |
| MARBLE DESIGN    | 6.9        | 0.4    | 6%  |

| NOMU-Top Losers | Last Price | Change |     |
|-----------------|------------|--------|-----|
|                 | SAR/sh     | SAR    | %   |
| LEAF            | 23.11      | -2.21  | -9% |
| SIGN WORLD      | 13.21      | -0.99  | -7% |
| TAQAT           | 11.9       | -0.89  | -7% |

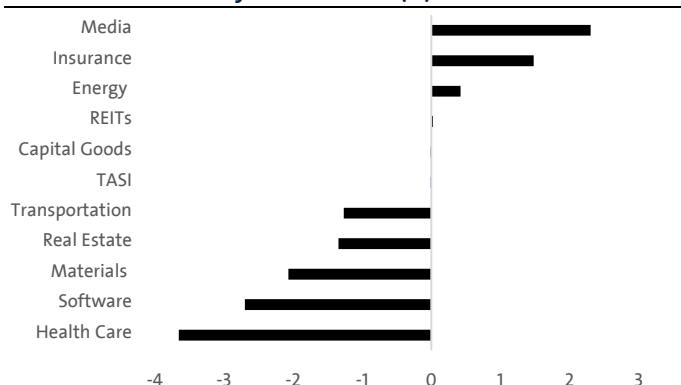
Source: Tadawul

| TASI -Most Traded by Volume | Last Price | Change |     | Volumes |
|-----------------------------|------------|--------|-----|---------|
|                             | SAR/sh     | SAR    | %   | mn      |
| AMERICANA                   | 2.01       | -0.02  | -1% | 41.6    |
| CHEMICAL                    | 8.29       | -0.21  | -2% | 12.7    |
| BATIC                       | 2.32       | -0.02  | -1% | 12.0    |

| TASI -Most Traded by Value | Last Price | Change |     | Value |
|----------------------------|------------|--------|-----|-------|
|                            | SAR/sh     | SAR    | %   | SARmn |
| ALRAJHI                    | 67.65      | -1.1   | -2% | 512   |
| SAUDI ARAMCO               | 27.64      | 0.14   | 1%  | 324   |
| MAADEN                     | 63.55      | -3.7   | -6% | 242   |

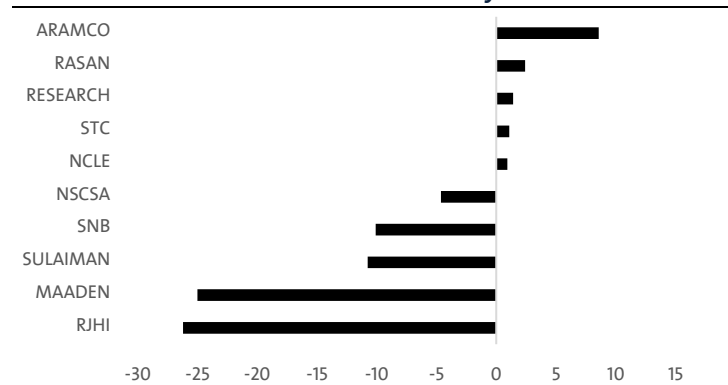
Source: Tadawul

## 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                       |
|--------|--------------------|-----------------------------|
| 05-May | SAUDI ENERGY       | Elgibility of Cash Dividend |
| 05-May | ALBILAD            | Elgibility of Cash Dividend |
| 05-May | DERAYAH REIT       | Elgibility of Cash Dividend |
| 05-May | SAB                | Earnings call               |
| 06-May | SAVOLA GROUP       | Elgibility of Cash Dividend |

Source: Argaam, GSTAT

## Global Market Calendar

| Date   | Country | Event                  | Period | Forecast | Previous |
|--------|---------|------------------------|--------|----------|----------|
| 05-May | U.S.    | JOLTS Job Openings     | Apr    | 6.890M   | 7.240M   |
| 06-May | U.S.    | ADP Employment Change  | Apr    | +155K    | +180K    |
| 07-May | U.S.    | Initial Jobless Claims | Apr    | 208K     | 210k     |
| 07-May | U.S.    | Nonfarm Payrolls (NFP) | Apr    | 228k     | 200k     |
| 08-May | U.K.    | BoE Interest Rate      | Apr    | 3.75%    | 3.75%    |

Source: Bloomberg, Investing.Com

# Daily Market Report

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