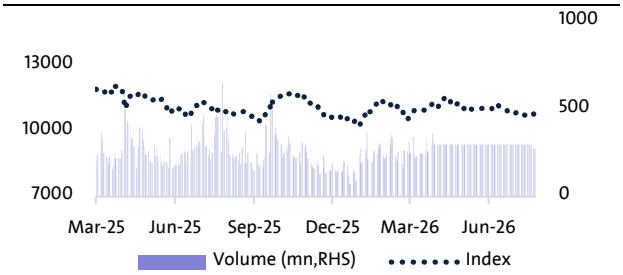
Daily Market Report

Key Indices-Return and Valuation

	31-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11127	-0.3%	0.0%	5%	14.5	1.6
NOMU	21747	-0.1%	0.0%	-8%	0.0	1.6
S&P500	7686	-0.3%	0.0%	12%	21.1	5.6
Dow Jones	53186	-0.7%	0.0%	11%	13.3	5.9
FTSE 100	10824	0.0%	0.0%	9%	13.3	2.4
EuroStoxx50	6420	-1.0%	0.0%	11%	16.2	2.5
Nikkei225	66312	-0.1%	-0.2%	32%	21.9	2.9
MSCI EM	1719	-0.2%	0.0%	22%	11.5	2.4
SHCOMP	3986	0.9%	0.0%	0%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
31-Aug	86	176	8	0.5:1

Money Market Yields

%	SAIBOR			Term SOFR		
	31-Aug	Δ bps	YTD Av	31-Aug	Δ bps	YTD Av
1M	4.65	-5.1	5.6	3.69	0.1	4.3
3M	4.84	8.1	5.4	3.76	-0.3	4.3
6M	5.25	-5.6	5.5	3.87	0.1	4.2
12M	5.08	2.1	5.2	4.02	0.7	4.0

Commodities

		31-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	87	1.7	135	60	-13.9
Brent	USDbbl	90	1.3	118	59	-14.0
Gold	USDOz	4437	-0.4	5417	3448	-21.6
Silver	USDOz	67	0.3	117	40	-40.0
Aluminum	USDton	3234	0.0	3851	2595	-16.5
Copper	USDton	14370	0.0	14370	9862	-20.1

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

solutions signs revenue-sharing agreement to develop 'Madares' platform

Arabian Internet and Communications Services Co. (solutions) signed a revenue-sharing agreement with Education Development Holding Co., through its subsidiary Tatweer Educational Technologies Co. (TETCO)—the strategic arm of the Ministry of Education. solutions will contribute to the development and enhancement of "Madares", the unified national platform for private-sector services in Saudi Arabia's education sector, **(Argaam)**

MIS lands SAR 301.2M purchase orders

Al Moammar Information Systems Co. (MIS) received two purchase orders from the Ministry of Municipalities and Housing worth SAR 301.2 million, including VAT, on The company said that the purchase orders are for providing information systems services (Microsoft). The contract has a duration of three years, with the financial impact expected to appear as of Q3 2026 through Q3 2029. **(Argaam)**

Luberef inks 10-year agreement with Aramco to supply feedstock, sell return streams

Saudi Aramco Base Oil Co. (Luberef) signed a new agreement with Saudi Arabian Oil Co. (Saudi Aramco) for the supply of feedstock and sale of return streams, replacing the previous agreement. The company said the agreement was signed on Aug. 30, 2026, and has a 10-year term starting Aug. 29, 2026. It is renewable by mutual agreement. **(Argaam)**

Tasnee completes sale of entire stake in Al-Rowad for SAR 684M

National Industrialization Co. (Tasnee) completed the sale of its entire equity stake in Al-Rowad Industrial Transformation Co. to Tahweel Holding on Aug. 31, 2026. The company said the transaction was completed after all required conditions were met, including obtaining the mandatory regulatory approvals, satisfying all conditions precedent under the sale agreement, and transferring full ownership of the target company to Tahweel Holding. **(Argaam)**

Global

Japan's benchmark bond yield rises to 3% for first time in 30 years

Japan's benchmark 10-year bond yield hit 3% on Tuesday for the first time since September 1996, pushed higher by investor concerns about inflation, fiscal health and mounting pressure on the central bank to hike interest rates faster. With the Middle East crisis stoking inflation fears globally and pressure on the Bank of Japan to accelerate rate hikes, yields have jumped to historic levels across the Japanese government bond curve. **(Reuters)**

Commodities

Oil rises as US, Iran resume military attacks

Oil prices were trading nearly 2% higher on Monday after the U.S. attacked an Iranian island in the Strait of Hormuz and drew retaliation from Tehran, as their conflict extended into its sixth month. Brent crude futures climbed $1.77, or 2%, to $89.87 a barrel by 0733 GMT while U.S. West Texas Intermediate crude was at $84.85, up $1.45, or 1.74%. **(Reuters)**

Gold dips as Fed rate-hike bets rise, still heads for best month since January

Gold slipped on Monday as renewed Middle East attacks stoked inflation worries and hawkish comments from Federal Reserve Chair boosted expectations for a September rate hike, though bullion remained on track for its biggest monthly gain since January. Spot gold fell 0.1% to $4,448.19 per ounce by 1030 GMT, having touched its lowest level since August 19 earlier. U.S. gold futures for December delivery dropped 0.7% to $4,498.90. **(Reuters)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics

		30-Aug	31-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2337	2330	-0.3%	0.0%	4.5%
Value	mn	3487	10236	193.6%	0.0%	102.5%
Volume	mn	189	426	125.2%	0.0%	72.0%
NOMU						
Market Cap	mn	7023	7016	-0.1%	0.0%	-7.5%
Value	mn	46.2	55.7	20.5%	0.0%	150.9%
Volume	mn	2.5	11.3	343.3%	0.0%	352.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALFAKHERA	8.5	1.09	15%
NGDC	28	3.53	14%
WATANI STEEL	2.15	0.19	10%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
THARWAH	22	-4.78	-18%
MEYAR	24.25	-3.75	-13%
JAMJOOM FASHION	97.7	-10.8	-10%

Source: Tadawul

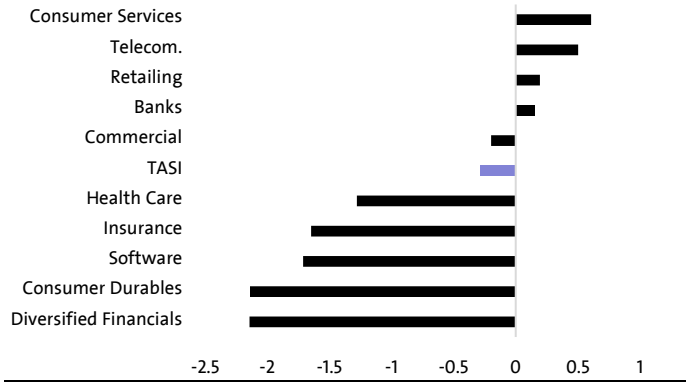
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MESC	35.4	2.82	9%
EAST PIPES	196.7	10	5%
SAUDI CABLE	183.5	8.3	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NASEEJ	17.68	-1.96	-10%
ARMAH	54.05	-3.05	-5%
MASAR	17.08	-0.87	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BJAZ	12	-0.17	-1%	56.8
SAUDI DARB	2.25	0.01	0%	29.8
AMERICANA	2.49	0.03	1%	28.4
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67.45	-0.35	-1%	767
BJAZ	12	-0.17	-1%	683
TADAWUL GROUP	130	-6.2	-5%	547

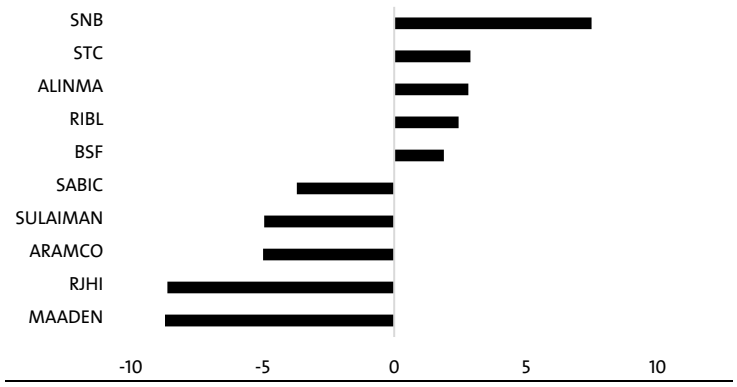
Source: Tadawul

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
01-Sep	AVALON PHARMA	Ex-dividend Date
02-Sep	GO TELECOM	Ex-dividend Date
03-Sep	MESC	Earnings call
03-Sep	TAWUNIYA	Ex-Bonus Day
06-Sep	YANSAB	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
01-Sep	U.S.	JOLTS Job Openings	Aug	7.440M	7.537M
04-Sep	U.S.	Average Hourly Earnings	Aug	0.3%	0.3%
10-Sep	E.U.	Deposit Facility Rate	Aug	2.25%	2.25%
11-Sep	U.S.	Consumer Price Index	Aug	3.4%	3.5%
16-Sep	U.S.	Fed Interest Rate Decision	Aug	3.75%	3.75%

Source: Bloomberg, Investing.Com

Classification: Private

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

Classification: Private

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 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.

Classification: Private