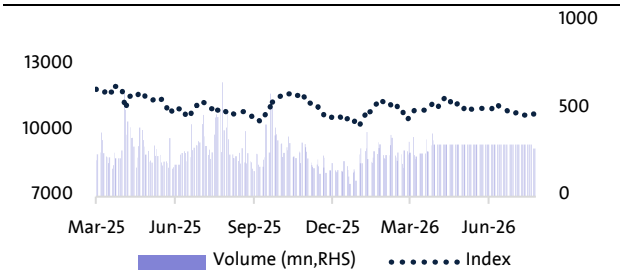
Daily Market Report

Key Indices-Return and Valuation

	01-Sep*	DoD	MTD	YTD	P/E	P/BV
TASI	11101	-0.2%	0.0%	5%	14.5	1.6
NOMU	21846	0.5%	0.0%	-7%	0.0	1.6
S&P500	7631	-0.7%	0.0%	11%	20.9	5.6
Dow Jones	52767	-0.8%	0.0%	10%	13.2	5.9
FTSE 100	10789	-0.3%	0.0%	9%	13.2	2.4
EuroStoxx50	6369	-0.8%	0.0%	10%	16.1	2.5
Nikkei225	66215	-0.1%	0.0%	32%	21.9	2.9
MSCI EM	1727	0.5%	0.0%	23%	11.5	2.4
SHCOMP	3980	-0.2%	0.0%	0%	14.1	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
01-Sep	126	137	7	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	01-Sep	Δ bps	YTD Av	01-Sep	Δ bps	YTD Av
1M	4.65	-5.7	5.6	3.71	2.5	4.3
3M	4.90	14.2	5.4	3.80	4.4	4.3
6M	5.29	-1.6	5.5	3.94	6.5	4.2
12M	5.08	1.8	5.2	4.11	8.9	4.0

Commodities

		01-Sep	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	91	4.6	135	60	-13.9
Brent	USDbbl	95	4.6	118	59	-14.0
Gold	USDOz	4329	-2.4	5417	3476	-21.6
Silver	USDOz	64	-3.7	117	41	-40.0
Aluminum	USDton	3280	1.4	3851	2595	-16.5
Copper	USDton	14215	-1.1	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

Consumer spending rises 8% to SAR 144.95B in July

Consumer spending in Saudi Arabia increased to SAR 144.95 billion in July, up 8% from nearly SAR 134.51 billion in July 2025. Consumer spending in the Kingdom includes total cash withdrawals, point-of-sale (POS) transactions, and e-commerce sales through the Mada network. POS sales in Saudi Arabia rose by 7% year-on-year (YoY) to about SAR 62.85 billion in July. **(Argaam)**

CMA outlines requirements for Saudi commodity exchange license

The Capital Market Authority (CMA) issued a list of the main inquiries it has received regarding applications for authorization to conduct commodity exchange activities in the Kingdom **(Argaam)**

Kingdom Holding completes SAR 840M acquisition of Al-Hilal Club

Kingdom Holding Company (KHC) completed the acquisition of a 70% stake in Al-Hilal Club Co. from the Public Investment Fund (PIF) after fulfilling all transaction conditions and paying the full SAR 840 million consideration. **(Argaam)**

GAC approves Nofoth's acquisition of 65% stake in Plenty Food

Nofoth Food Products Co. announced that the General Authority for Competition (GAC) has issued its no-objection approval for the economic concentration resulting from its acquisition of a 65% stake in Plenty Food Co. **(Argaam)**

Future Vision, Taif University sign 2-year professional diploma contract

Future Vision for Health Training Co. signed a contract with the Research and Consulting Center at Taif University. The company has signed a two-year Memorandum of Understanding (MoU) to strengthen cooperation in training, education, consulting and research **(Argaam)**

NDMC completes USD 3.25B international sukuk issuance arrangements

The National Debt Management Center (NDMC) completed arrangements for an international issuance of US dollar-denominated Saudi government sukuk under the Saudi Government's International Sukuk Issuance Program, structured on an Ijarah structure. This marks the Saudi Government's second international sukuk issuance structured on an Ijarah structure. **(Argaam)**

Global

Banks rush to swap higher-risk credit assets for BoE cash

British banks are increasingly pledging higher-risk assets such as loans linked to high-interest store cards and vehicle leases as collateral at the Bank of England, a Reuters review of BoE filings shows. On August 18, banks pledged £1.9 billion worth of the BoE's highest-risk type of collateral at its weekly auction for six-month funds, its data shows, the most since March 2020 and three times as much as in the previous week. **(Reuturs)**

No shortage of culprits in panic over long US Treasury yields

Higher long-end Treasury yields are unlikely to retreat anytime soon, and a host of intertwined supply and demand factors will likely hamstring U.S. policymakers seeking to cap borrowing costs. That is because the renewed surge in rates reflects immediate concerns about the inflation picture in the U.S. **(Reuturs)**

Commodities

Saudi Aramco and Sonatrach raise LPG prices for September

Saudi Aramco has raised official selling prices for liquefied petroleum gas by between 1% and 3% for September due to higher demand on the global markets, traders said on Tuesday. Algeria's Sonatrach lifted LPG prices for September by between 4% and 7% **(Reuturs)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics

		31-Aug	01-Sep	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2330	2325	-0.2%	0.0%	4.3%
Value	mn	10236	5180	-49.4%	0.0%	3.1%
Volume	mn	426	238	-44.2%	0.0%	-3.5%
NOMU						
Market Cap	mn	7016	7047	0.5%	0.0%	-7.1%
Value	mn	55.7	39.1	-29.7%	0.0%	76.3%
Volume	mn	11.3	7.3	-35.4%	0.0%	191.2%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALFAKHERA	9.5	1	12%
UNITED MINING	53	4.8	10%
ALBABTAIN FOOD	26.94	2.43	10%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MUFEED	22	-3.5	-14%
RATIO	2.8	-0.43	-13%
NAF	7.8	-1	-11%

Source: Tadawul

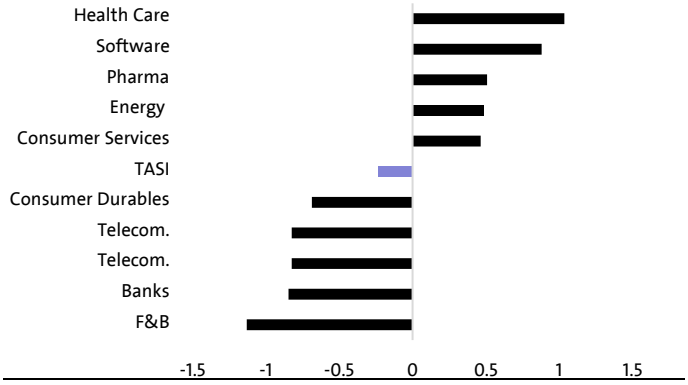
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MIS	314	21	7%
AZM	27.92	1.62	6%
SOLUTIONS	216	12	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SFICO	67.9	-4	-6%
NASEEJ	16.96	-0.72	-4%
SISCO HOLDING	38.84	-1.26	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.48	-0.01	0%	17.6
CHEMICAL	8.06	0.28	4%	16.2
PETRO RABIGH	17.55	0.68	4%	10.6
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67	-0.45	-1%	553
SAUDI ARAMCO	26.18	0.12	0%	199
PETRO RABIGH	17.55	0.68	4%	186

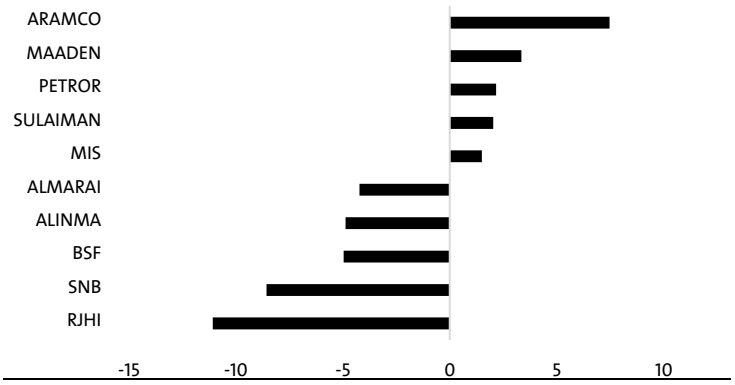
Source: Tadawul

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
02-Sep	GO TELECOM	Ex-dividend Date
03-Sep	MESC	Earnings call
03-Sep	TAWUNIYA	Ex-Bonus Day
06-Sep	YANSAB	Ex-dividend Date
08-Sep	KSA Warehous & Logistics Expo	Exhibitions and conferences

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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	Sep	3.75%	3.75%
17-Sep	U.K.	Interest Rate Decision	Sep	3.75%	3.75%

Source: Bloomberg, Investing.Com

Classification: Private

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