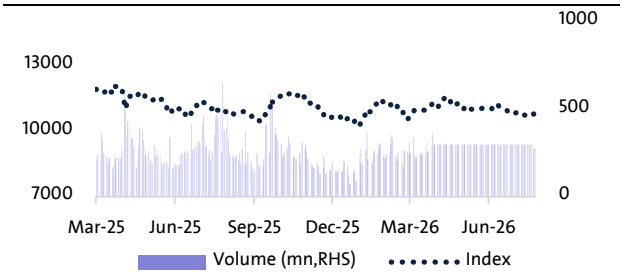
Daily Market Report

Key Indices-Return and Valuation

	08-Sep*	DoD	MTD	YTD	P/E	P/BV
TASI	11036	0.1%	-0.6%	5%	14.4	1.5
NOMU	21707	-0.2%	-0.6%	-8%	0.0	1.5
S&P500	7674	-1.0%	0.6%	12%	21.0	5.6
Dow Jones	52786	-1.7%	0.0%	10%	13.2	5.9
FTSE 100	10812	-0.2%	0.2%	9%	13.2	2.4
EuroStoxx50	6413	0.5%	0.7%	11%	16.2	2.5
Nikkei225	65269	1.6%	-1.4%	30%	21.6	2.8
MSCI EM	1752	2.9%	1.4%	25%	11.7	2.4
SHCOMP	3933	-0.2%	-1.2%	-1%	14.0	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
08-Sep	92	160	20	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	08-Sep	Δ bps	YTD Av	08-Sep	Δ bps	YTD Av
1M	4.70	4.3	5.6	3.76	1.7	4.3
3M	4.83	-3.4	5.4	3.84	0.8	4.3
6M	5.31	3.1	5.5	3.98	0.8	4.2
12M	5.14	0.8	5.2	4.18	0.4	4.0

Commodities

		08-Sep	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	102	6.4	135	60	-14.3
Brent	USDbbl	98	0.9	118	59	-14.6
Gold	USDOz	4356	-1.1	5417	3627	-21.9
Silver	USDOz	66	-0.6	117	41	-40.4
Aluminum	USDton	3345	1.0	3851	2621	-16.9
Copper	USDton	14705	1.8	14370	9895	-20.7

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 cement sales stabilize at 4.58M tons in August

Saudi Arabia's 17 cement companies sold a combined 4.58 million tons in August, almost unchanged compared with 4.59 million tons in the same month last year, A total of nine companies recorded higher sales compared with August 2025, led by Eastern Cement Co. (+23%), followed by Arabian Cement Co. (+15%) and Najran Cement Co. (+14%). **(Argaam)**

Elm subsidiary signs contract with Ministry of Commerce to digitize services

Elm Co. announced that its wholly owned subsidiary, Thiqah Business Services Co., signed a contract with the Ministry of Commerce to digitize the ministry's services and provide services electronically to beneficiaries. The expected revenue over the contract term is nearly 19% of Elm's total revenue. Elm said the five-year contract started on Sept. 3. The contract is based on a revenue-sharing model **(Argaam)**

Edarat secures SAR 197.8M contract from MIS

Edarat Communication and Information Technology Co. received an award letter from Al Moammar Information Systems Co. (MIS), valued at SAR 197.8 million, including VAT. Edarat said it will be responsible for the design and provision of construction supervision, testing, and commissioning services for an artificial intelligence (AI) data center project with a planned total capacity of 200 megawatts. **(Argaam)**

Qassim Cement acquires 100% of E-Mix Ready Mix for SAR 65M

Qassim Cement Co. signed on Sept. 8 a share purchase agreement with the shareholders of Amix Co. For Ready Mix Concrete to acquire 100% of the company's shares for SAR 65 million. **(Argaam)**

Tadawul approves Merrill Lynch KSA as market maker for 13 stocks

The Saudi Exchange (Tadawul) approved Merrill Lynch KSA's request to conduct market-making activities for 13 companies listed on the Main Market (TASI) and Nomu-Parallel Market, effective Sept. 9, For the six Nomu-listed companies, Merrill Lynch KSA will be required to maintain a minimum order presence of 50%, a minimum order size of SAR 50,000, and a maximum price spread of 5%. No minimum traded value requirement applies. **(Argaam)**

Global

Yen stands tall as dollar drifts, oil's run towards $100 chills sentiment

The Japanese yen steadied near its strongest level since February on Wednesday, keeping the dollar on the defensive as traders grappled with oil prices pushing towards $100 per barrel in the face of a widening war in the Middle East. Iranian-backed Houthis in Yemen launched strikes on several Saudi Arabian cities, further embroiling a U.S. ally in the conflict, while American forces hit multiple Iranian oil tankers and Tehran struck a U.S. base in Jordan. **(Reuters)**

Commodities

Brent crude crosses $99 amid supply concerns

Oil prices rose today, Sept. 9, posting gains for the fourth consecutive session, following renewed military attacks in the Middle East that raised concerns about disruptions to global energy supplies. Brent crude prices have jumped by about 25% since early August, amid fading hopes for a permanent solution to the conflict and escalating field confrontations, pushing prices towards the $100 per barrel level **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		07-Sep	08-Sep	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2309	2311	0.1%	-0.6%	3.7%
Value	mn	3367	3180	-5.5%	-14.2%	-36.0%
Volume	mn	186	156	-16.0%	-14.4%	-35.9%
NOMU						
Market Cap	mn	7014	7002	-0.2%	-0.6%	-7.7%
Value	mn	51.1	31.9	-37.5%	-14.2%	41.2%
Volume	mn	9.5	6.2	-34.6%	-14.1%	135.8%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALFAKHERA	13.52	3.12	30%
AICTEC	1.3	0.12	10%
TIME	20.4	1.53	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
WAJD LIFE	5.15	-0.84	-14%
RAWASI	3.25	-0.35	-10%
APICO	32.02	-3.44	-10%

Source: Tadawul

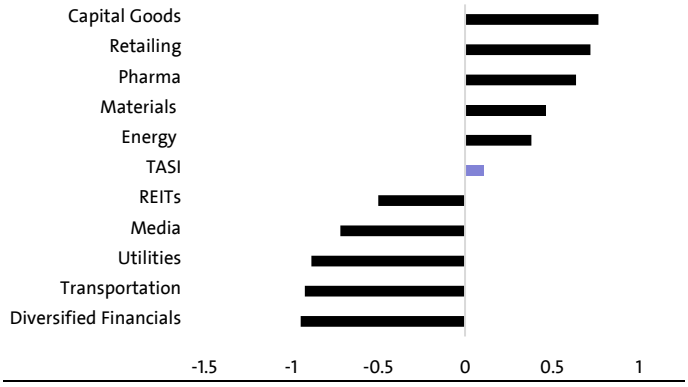
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
BANAN	3.5	0.26	8%
SIDC	17.29	0.98	6%
NAJRAN CEMENT	5.92	0.31	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NGC	12.7	-0.47	-4%
SVCP	19.94	-0.57	-3%
SARCO	56.3	-1.5	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
CHEMICAL	8.26	0.02	0%	9.7
SAUDI ARAMCO	26.06	0.1	0%	8.3
BATIC	1.98	0	0%	6.0
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	66.7	0.2	0%	325
SAUDI ARAMCO	26.06	0.1	0%	215
SFICO	68.4	2	3%	95

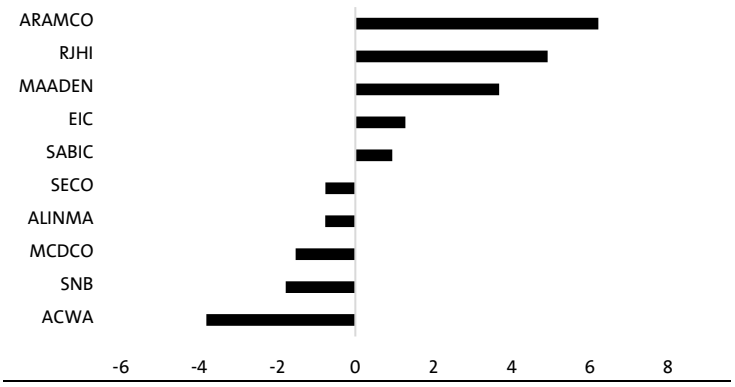
Source: Tadawul

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
09-Sep	General Authority For Statistics	Report
09-Sep	ADES	Cash dividends
09-Sep	ACWA	Cash dividends
13-Sep	RIYADH CEMENT	Ex-dividend Date
15-Sep	SUMOU	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
23-Sep	U.S.	Purchasing Managers Index (PMI)	Sep	53.2	53.9

Source: Bloomberg, Investing.Com

Classification: Private

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