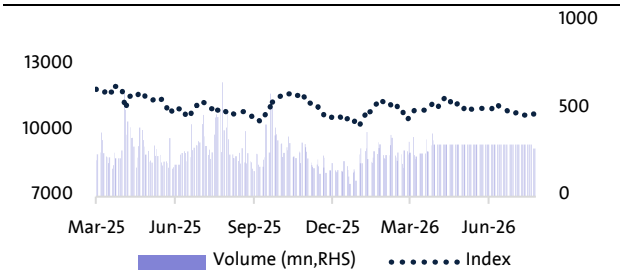
Daily Market Report

Key Indices-Return and Valuation

	20-Sep*	DoD	MTD	YTD	P/E	P/BV
TASI	10778	0.0%	-2.9%	2%	14.2	1.5
NOMU	21398	0.1%	-2.1%	-9%	0.0	1.5
S&P500	7651	-1.3%	0.2%	12%	20.9	5.6
Dow Jones	52786	-1.7%	0.0%	10%	12.9	5.7
FTSE 100	10812	-0.2%	0.2%	9%	12.9	2.4
EuroStoxx50	6413	0.5%	0.7%	11%	15.7	2.5
Nikkei225	65269	1.6%	-1.4%	30%	21.6	2.8
MSCI EM	1752	2.9%	1.4%	25%	11.3	2.4
SHCOMP	3864	-2.0%	-2.9%	-3%	13.9	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
20-Sep	45	219	8	0.2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	20-Sep	Δ bps	YTD Av	18-Sep	Δ bps	YTD Av
1M	4.81	5.8	5.6	3.89	0.4	4.3
3M	4.90	-8.8	5.4	4.00	1.2	4.3
6M	5.41	6.9	5.5	4.15	1.4	4.2
12M	5.10	-1.1	5.2	4.41	0.8	4.0

Commodities

		18-Sep	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	110	4.0	135	60	-15.5
Brent	USDbbl	104	-0.9	118	59	-15.9
Gold	USDOz	4379	0.9	5417	3685	-22.3
Silver	USDOz	66	1.6	117	43	-41.1
Aluminum	USDton	3290	-1.0	3851	2638	-17.4
Copper	USDton	14515	0.7	14705	9937	-21.6

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

Masar sells 4 land plots for SAR 604M, books capital gain of SAR 344.3M

Umm Al Qura for Development and Construction Co. (Masar) and Alinma Development II Ltd., a special purpose vehicle of Alinma Makkah Real Estate Fund, fully owned by Masar, signed four sale agreements for four land plots at the Masar Destination project in Makkah with ARABIAN DYAR Co. The four land plots are located in Zone 3 and do not overlook the pedestrian boulevard. They have a total area of 12,157 square meters. **(Argaam)**

BAAN Holding: Playocity Jeddah project to cost SAR 25M

BAAN Holding Group said the total estimated cost of its new Playocity entertainment project, in partnership with global brand Hasbro, at Westfield in Jeddah is SAR 25 million. The group added that the project will be financed through the company's own resources and bank facilities. **(Argaam)**

Building permits in Saudi Arabia hit 5,828 in July

The number of building permits issued in Saudi Arabia rose 4% year-on-year (YoY) to 5,828 in July 2026, from 5,582 a year earlier. On a monthly basis, the number of permits increased 16% from 5,045 in June **(Argaam)**

PIF launches Tawrid for supply-chain financing

The Public Investment Fund (PIF) announced today, Sept. 20, the launch of Tawrid Company for Financing Solutions, an innovative digital platform providing supply-chain financing products to companies in the Saudi Arabian market. **(Argaam)**

Equipment House plans 3M share buyback

Scientific and Medical Equipment House Co. (Equipment House) said its board of directors recommended on Sept. 20 the repurchase of up to 3 million shares, representing 10% of the company's total shares, to be held as treasury shares. **(Argaam)**

Global

UK property asking prices rise for first time since May, Rightmove says

British property sellers have increased the prices they want for their homes for the first time since May, real estate website Rightmove said on Monday. Prices for property put up for sale rose by 0.7% between August 9 and September 12, a slightly bigger monthly increase than average for the time of year and following a drop of 2.0% in the preceding four weeks, it said. **(Reuters)**

Yen steadies as intervention threat persists

The Japanese yen steadied on Monday following a sharp drop last week that stirred intervention jitters, while investors pondered the global interest-rate outlook after a wave of hikes and hawkish signals from major central banks this month. The yen was at 156.85 per US dollar after declining 2% last week. Japanese markets were closed for a three-day holiday, leading to low liquidity while keeping traders on alert for an official intervention. **(Reuters)**

Commodities

Diesel surge signals fresh wave of global inflation

Diesel markets are sending signals of a fresh wave of global inflationary pressure, with fuel prices surging to record levels and inventories declining as US refineries operate near full capacity amid continued supply disruptions in the Middle East and Russia. The diesel price surge has implications beyond the energy market, as the fuel is essential for trucking, goods transportation, agricultural and construction equipment, as well as heating. **(Reuters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		17-Sep	20-Sep	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2258	2257	0.0%	-2.9%	1.2%
Value	mn	3453	5222	51.2%	28.2%	5.5%
Volume	mn	163	215	31.6%	13.7%	-11.2%
NOMU						
Market Cap	mn	6896	6903	0.1%	-2.1%	-9.0%
Value	mn	54.0	58.0	7.3%	12.5%	138.6%
Volume	mn	5.8	8.9	52.9%	19.7%	214.2%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
KNOWLEDGE TOWER	8.38	1.93	30%
HKC	29.5	4.4	18%
GROUP FIVE	70.95	6.55	10%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NABA ALSAHA	22.25	-2.75	-11%
TAQAT	7.02	-0.78	-10%
HORIZON EDUCATIONAL	79	-7.9	-9%

Source: Tadawul

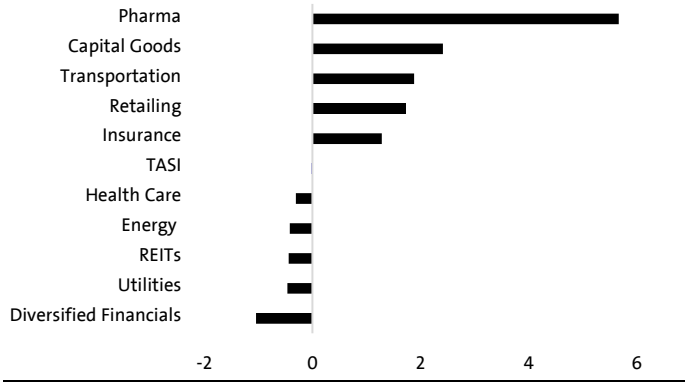
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
CENOMI CENTERS	16.66	0.91	6%
NOFOTH	7	0.35	5%
ENTAJ	21.29	0.95	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MUTAKAMELA	11.01	-1.09	-9%
LADUN	1.66	-0.14	-8%
ALETIHAD	6.7	-0.49	-7%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
ALKATHIRI	1.05	-0.06	-5%	8.8
APC	5.44	-0.02	0%	7.3
BATIC	1.83	-0.05	-3%	6.4
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	66.15	0.15	0%	253
SAUDI ARAMCO	25.9	0.34	1%	142
EIC	15.8	0.4	3%	81

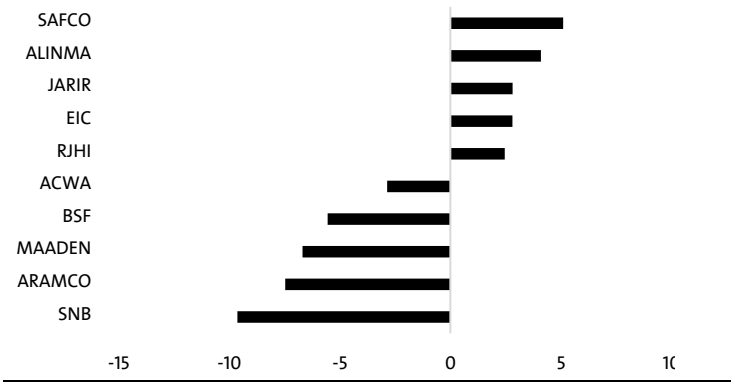
Source: Tadawul

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
23-Sep	Saudi financial market	Official holidays
30-Sep	SAMA	Report
01-Oct	LUBEREF	Ex-dividend Date
01-Oct	KINGDOM	Ex-dividend Date
06-Oct	GAS	Cash dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
23-Sep	U.S.	Purchasing Managers Index (PMI)	Sep	53.2	53.9
25-Sep	U.S.	Durable Goods Orders	Sep	0.4%	0.3%
29-Sep	U.S.	Consumer Confidence	Sep	90.3	90.2
29-Sep	U.S.	JOLTS Job Openings	Sep	7.182M	7.330M
30-Sep	U.S.	GDP Q2	Sep	1.5%	2.1%

Source: Bloomberg, Investing.Com

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