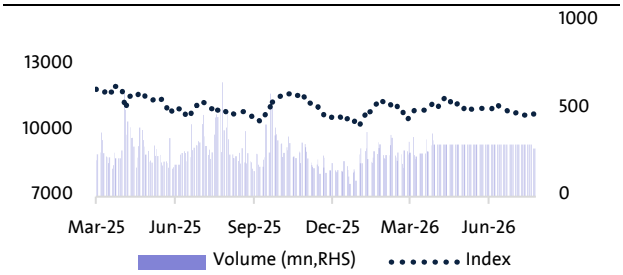
Daily Market Report

Key Indices-Return and Valuation

	28-Sep*	DoD	MTD	YTD	P/E	P/BV
TASI	10,681	0.8%	-2.9%	2%	14.2	1.5
NOMU	21,549	0.0%	-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
27-Sep	52	208	12	0.2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	28-Sep	Δ bps	YTD Av	28-Sep	Δ bps	YTD Av
1M	4.94	2.6	5.6	3.85	0.4	4.3
3M	5.22	1.9	5.4	4.07	1.2	4.3
6M	5.36	-1.75	5.5	4.18	1.4	4.2
12M	5.33	3.19	5.2	4.46	0.8	4.0

Commodities

		28-Sep	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	99	-4.00	135	60	-15.5
Brent	USDbbl	107	3.86	118	59	-15.9
Gold	USDOz	4136	-2.7	5417	3685	-22.3
Silver	USDOz	65	-3.35	117	43	-41.1
Aluminum	USDton	3248	-0.11	3851	2638	-17.4
Copper	USDton	7	-0.88	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

Crude Shipments Resume Following Successful Repairs

Aramco restarted external crude oil shipments through the critical East–West pipeline after a precautionary shutdown on September 11 due to regional security incidents. The resumption restores key export flexibility through the port of Yanbu. **(Argaam)**

Masar signs 2 land sale agreements at SAR 310.4M

Umm Al Qura for Development and Construction Co. (Masar) and Al-Inma Second Development Co. Ltd. — the special purpose vehicle (SPV) for Al-Inma Makkah Development Fund II, all units of which are owned by Masar — signed two agreements with Abdulmohsin Al Rossais & Sons Group Co. to sell two land plots within Masar Destination in Makkah. The agreements are valued at SAR 310.44 million, excluding taxes and fees to be borne by the buyer. **(Argaam)**

111 securities may be subject to CMA algorithmic trading controls

The Capital Market Authority's (CMA) draft rules governing algorithmic trading in the Saudi market are tied to securities' liquidity levels. The draft rules exempt securities classified as having "very high liquidity" from the proposed limit on the ratio of algorithmic orders to executed trades. **(Argaam)**

MOBI applies to move from Nomu to TASI

MOBI Industry Co. said it formally submitted on Sept. 28, 2026 a request to transfer to the Main Market (TASI), through the automated system designated by the regulatory authorities for this purpose. **(Argaam)**

Dar Almarkabah recommends 20-for-1 share consolidation

Dar Almarkabah for Renting Cars Co.' board of directors recommended, via circulation on Sept. 28, a 20-for-1 share consolidation, increasing the nominal value of each share from SAR 0.50 to SAR 10. **(Argaam)**

Arabian Pipes signs SAR 96M Aramco contract

Arabian Pipes Co. signed today, Sept. 28, a contract with Saudi Aramco for the manufacturing and supply of steel pipes, with an estimated value of approximately SAR 96 million. **(Argaam)**

Global

China factories seen rebounding in September as Beijing signals more aid

China's factory activity likely swung back to growth in September after two months of contraction, a Reuters poll showed on Tuesday, though a cabinet meeting on Monday underscored the need for further policy support to shore up the economy. The official manufacturing purchasing managers' index (PMI) is expected to rise to 50.1 in September from 49.8 the previous month, ending two straight months of contraction **(Reuturs)**

Commodities

Oil prices rise for second session on continued Middle East supply concerns

Oil prices rose for a second successive session on Tuesday as lingering concern ov Middle East supply disruption brought about by the US-Israeli war on Iran outweighe signs of recovering crude exports from the region. Brent crude futures for November ro $1.71, or 1.6%, to $106.99 a barrel at 0626 GMT, while the more actively traded Bre December contract rose $1.68 to $99.51 a barrel. **(Reuturs)**

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Daily Market Report

TASI & NOMU- Key Statistics

		27-Sep	28-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	%
ITMAM	14.7	1.09	8%
KNOWLEDGE TOWER	10.76	0.64	6%
MOBI INDUSTRY	11.85	0.63	6%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NBM	44.98	-5.42	-11%
TAQAT	7	-0.81	-10%
NAF	6.17	-0.64	-9%

Source: Tadawul

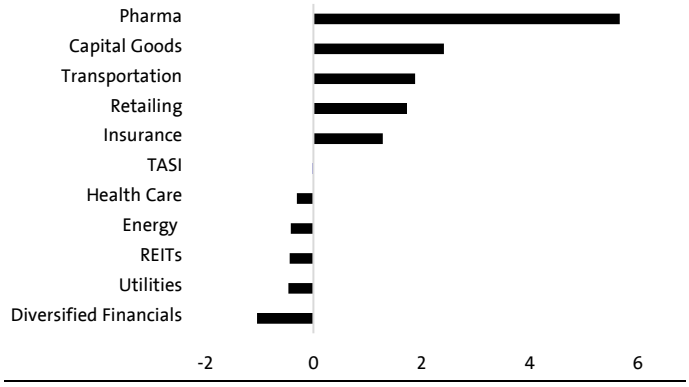
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALKATHIRI	1.15	0.07	6%
SALAMA	7.55	0.45	6%
ALRAMZ	55.25	2	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SFICO	51.6	-4.4	-8%
RASAN	130.9	-7.4	-5%
ENTAJ	21.5	-1.18	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
LADUN	1.96	0.1	5%	17.4
AMERICANA	2.36	-0.01	0%	7.1
SAUDI ARAMCO	25.82	0.04	0%	6.0
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	25.54	-0.28	-1%	349
ALRAJHI	63.75	-1	-2%	336
RASAN	130.9	-7.4	-5%	285

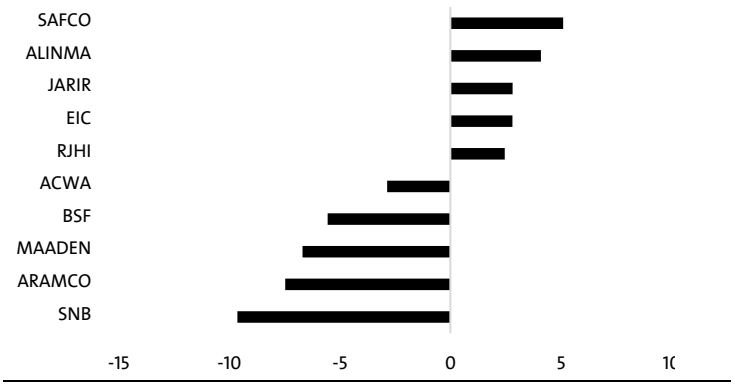
Source: Tadawul

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
30-Sep	SAMA	Report
01-Oct	LUBEREF	Ex-dividend Date
01-Oct	KINGDOM	Ex-dividend Date
06-Oct	GAS	Cash dividend
07-Oct	Qassim cement	Cash dividend

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
01-Oct	U.S.	ISM Manufacturing Prices	Sep	70.5	71.1
13-Oct	U.S.	Existing Home Sales	Sep	3.98M	4.06M

Source: Bloomberg, Investing.Com

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