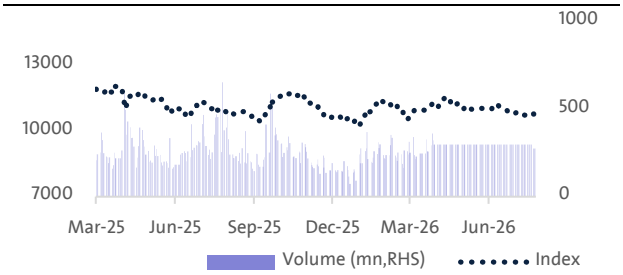
Daily Market Report

Key Indices-Return and Valuation

	03-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10824	1.1%	2.2%	3%	14.3	1.5
NOMU	21917	0.1%	0.4%	-7%	0.0	1.5
S&P500	7601	1.5%	1.5%	11%	21.4	5.7
Dow Jones	53178	1.3%	1.3%	11%	13.4	6.1
FTSE 100	10858	-0.1%	-0.1%	9%	13.4	2.4
EuroStoxx50	6427	1.1%	1.1%	11%	16.3	2.6
Nikkei225	63755	-0.9%	-0.9%	27%	21.6	2.9
MSCI EM	1651	-0.9%	-0.9%	18%	11.6	2.5
SHCOMP	3810	-0.6%	-0.6%	-4%	13.5	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
03-Aug	225	32	13	7:1

Money Market Yields

%	SAIBOR			Term SOFR		
	03-Aug	Δ bps	YTD Av	03-Aug	Δ bps	YTD Av
1M	4.67	1.1	5.6	3.71	-2.5	4.3
3M	4.98	11.4	5.4	3.81	-1.2	4.3
6M	5.01	-17.6	5.5	3.95	-0.4	4.2
12M	4.94	-0.5	5.2	4.12	0.8	4.0

Commodities

		03-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	75	-16.1	135	60	-13.0
Brent	USDbbl	84	-7.0	118	59	-12.3
Gold	USDOz	4054	0.2	5417	3316	-20.1
Silver	USDOz	58	1.0	117	37	-38.0
Aluminum	USDton	3252	1.1	3851	2553	-15.2
Copper	USDton	13876	0.6	14140	9594	-17.9

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 Aramco H1 2026 net profit jumps 33% SAR 241.64B; Q2 at SAR 121.51B

Saudi Arabian Oil Co. (Saudi Aramco) reported a 33% net profit increase to SAR 241.64 billion in H1 2026, from SAR 181.31 billion in the year-earlier period. This was driven by an increase year-on-year (YoY) in revenue to SAR 989.0 billion in H1 2026, on higher realized prices for refined products, chemicals, and crude oil. This was partially offset by lower sales volumes of crude oil, refined products, and chemicals, as well as higher operating costs and increased income tax and Zakat expenses.**(Argaam)**

solutions wins SAR 364M Center3 contract to build Dammam data center

Arabian Internet and Communications Services Co. (solutions) signed a contract with Center3 Digital Data and Communications Co. (Center3) to construct, build, and equip the DDC307 data center in Dammam for SAR 364 million, according to a statement to Tadawul. **(Argaam)**

MIS wins SAR 80.9M project with CMA

Al Moammar Information Systems Co. (MIS) won a project by the Capital Market Authority (CMA) worth SAR 80.88 million, including VAT. The project aims to deliver comprehensive managed services for the operation and enhancement of IT services. **(Argaam)**

Saudi non-oil sector expands in July as new orders rise: PMI

Saudi Arabia's non-oil private sector growth eased slightly in July but remained in expansion territory for a fourth consecutive month, supported by rising order volumes despite a decline in export demand, a business survey showed. **(Zawya)**

Global

Yen clings to intervention gains as traders stay alert to more

The yen held on to most of its intervention-driven gains on Tuesday, after last week's joint action by Tokyo and Washington to shore up the currency kept speculators wary of rebuilding bearish positions. The yen weakened in Asia trade and was down 0.2% at 157.55 per dollar, having hit a three-month high of 155.20 in the previous session, though it remained well above its 40-year low of 163.99 touched in July. **(Reuters)**

Japan's economy minister offers sanguine view on inflation

Japan has seen only moderate rises in consumer prices so far with the pass-through of higher costs from the Middle East conflict remaining limited, Economy Minister Minoru Kiuchi said on Tuesday, offering a sanguine view on inflationary risks. The assessment contrasts with that of the Bank of Japan, which last week issued its strongest warning to date on the risks of inflation overshooting its 2% target. **(Reuters)**

US Treasury raises third-quarter borrowing estimate to $739 billion

The U.S. Treasury said on Monday it expects to borrow $739 billion in the third quarter, $68 billion more than it projected in May, as lower projected cash flows were only partly offset by a higher-than-assumed starting cash balance. Stripping out the benefit of that larger starting cushion, the increase in borrowing needs is $87 billion above the May estimate. The department's quarterly refunding statement assumes a cash balance of $950 billion at the end of September. **(Reuters)**

Commodities

Oil ticks up after selloff as talks to end US-Iran war remain uncertain

Oil prices rebounded 1% on Tuesday from a plunge in the previous session, fuelled by concerns that Middle East supply remains at risk as a diplomatic resolution to the U.S.-Iran war that has disrupted shipments still seems unlikely. Front-month Brent futures rose $1.12, or 1.3%, to $84.89 a barrel by 0355 GMT after dropping 7% in the previous session to a three-week low. **(Reuters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		02-Aug	03-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2242	2267	1.1%	2.2%	1.7%
Value	mn	3702	6246	68.7%	15.7%	24.4%
Volume	mn	176	332	89.1%	18.6%	35.4%
NOMU						
Market Cap	mn	7063	7070	0.1%	0.4%	-6.8%
Value	mn	8.1	11.7	45.4%	11.6%	-45.8%
Volume	mn	1.7	1.6	-2.2%	-0.7%	-29.0%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MAYAR	2.89	0.29	11%
RIYAL	14.4	1.23	9%
MIRAL	108.8	9	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SMILE CARE	6.23	-0.57	-8%
ALKUZAMA	54	-4.5	-8%
ALASHGHAL ALMOYSRA	16.3	-1.19	-7%

Source: Tadawul

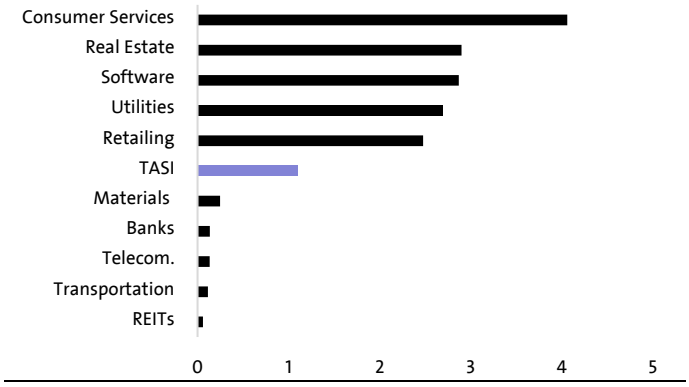
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NCLE	145.2	13.2	10%
PETRO RABIGH	16.97	1.54	10%
SIECO	2.52	0.2	9%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SHAKER	12.38	-0.84	-6%
TADCO	9.78	-0.47	-5%
SISCO HOLDING	35.54	-1.34	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.28	0.06	3%	38.8
PETRO RABIGH	16.97	1.54	10%	17.6
SIECO	2.52	0.2	9%	16.9
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	64.2	-0.3	0%	527
SAUDI ARAMCO	27.12	0.54	2%	417
PETRO RABIGH	16.97	1.54	10%	289

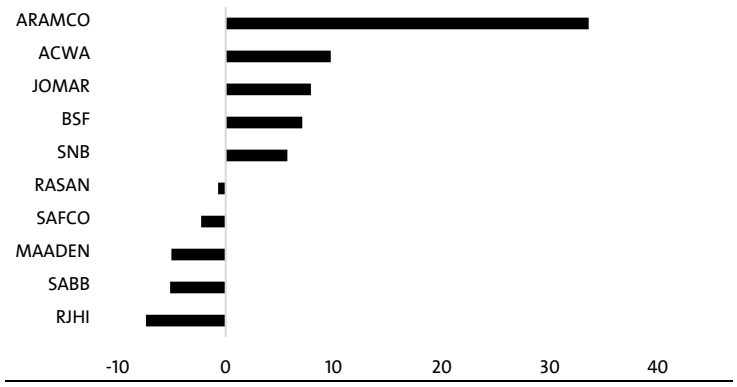
Source: Tadawul

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
04-Aug	ARAMCO	Financial results date
04-Aug	FIRST MILLS	Ex-dividend Date
04-Aug	AMERICANA	Ex-dividend Date
04-Aug	ELM	Ex-dividend Date
05-Aug	SAL	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
04-Aug	U.S.	JOLTS Job Openings	Jun	7.280M	7.585M
04-Aug	U.S.	Initial Jobless Claims	Jun	211.00K	209.00K
04-Jul	J.P.	S&P Manufacutring PMI	Jul	54.7	54.7
05-Aug	E.U.	HCOm Eurozone Composite PMI	Jun	51.6	51.6
05-Aug	J.P.	Monetary Policy Meeting Minutes			

Source: Bloomberg, Investing.Com

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