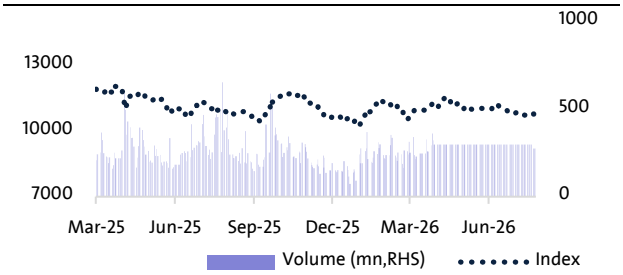
Daily Market Report

Key Indices-Return and Valuation

	04-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10858	0.3%	2.5%	3%	14.2	1.5
NOMU	22159	1.1%	1.5%	-6%	0.0	1.5
S&P500	7737	1.8%	3.3%	13%	21.6	5.7
Dow Jones	54086	1.7%	3.1%	13%	13.3	6.1
FTSE 100	10879	0.2%	0.1%	10%	13.3	2.4
EuroStoxx50	6487	0.9%	2.0%	12%	16.4	2.6
Nikkei225	63958	0.3%	-0.6%	27%	21.6	2.9
MSCI EM	1651	0.0%	-0.9%	17%	11.4	2.5
SHCOMP	3822	0.3%	-0.3%	-4%	13.6	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
04-Aug	189	66	15	2.8:1

Money Market Yields

%	SAIBOR			Term SOFR		
	04-Aug	Δ bps	YTD Av	04-Aug	Δ bps	YTD Av
1M	4.65	-0.8	5.6	3.65	-0.7	4.3
3M	4.93	6.0	5.4	3.76	0.8	4.3
6M	5.23	4.3	5.5	3.90	2.2	4.2
12M	4.95	-0.1	5.2	4.09	4.4	4.0

Commodities

		04-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	75	0.5	135	60	-13.0
Brent	USDbbl	79	-5.3	118	59	-12.3
Gold	USDOz	4078	0.6	5417	3316	-20.1
Silver	USDOz	60	2.4	117	37	-38.0
Aluminum	USDton	3241	-0.3	3851	2553	-15.2
Copper	USDton	14070	1.4	14140	9643	-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 PMI dips to 53.1 points in July

The seasonally adjusted Riyad Bank Saudi Arabia Purchasing Managers' Index (PMI), formerly S&P Global Saudi Arabia PMI, declined slightly to 53.1 points in July 2026. The index pointed to a fourth consecutive month of expansion in the sector, continuing to signal a strong improvement in business conditions across the non-oil private sector. Business activity increased sharply in July, with around 19% of companies reporting higher output, compared with just 4% reporting declines. **(Argaam)**

Hamad Bin Saedan awards SAR 19.8M residential project contract

Hamad Mohammed Bin Saedan Real Estate Co. awarded the HS Residences 2 residential project in Al Arid district to Abaad Almamar Contracting Co. The project aims for the construction of 60 residential units, with a total value of SAR 19.78 million (excluding VAT). **(Argaam)**

IHR awarded SAR 55.6M NWC manpower contract

International Human Resources Co. (IHR) secured a SAR 55.6 million manpower supply contract from the National Water Co. (NWC), excluding VAT. The company said the award is based on a 36-month agreement that will commence on Aug. 16. The contract is expected to be signed on Aug. 15. **(Argaam)**

SABIC divests specialty engineering plastics business in Europe, Americas

Saudi Basic Industries Corp. (SABIC) completely divested its specialty engineering plastics business in North America, South America and Europe on Aug. 3, 2026. This came after fulfilling all closing conditions, including obtaining the required regulatory approvals and completing all separation activities. **(Argaam)**

Al Majdiah signs SAR 395.8M agreement to develop 2 residential towers at Masar Destination

Dar Al Majed Real Estate Co. (Al Majdiah) signed a real estate development agreement with Alistithmar Real Estate Fund 9. Al Majdiah will act as the lead developer for two residential towers in Zone 1 of the Masar Destination in Makkah, on a total land area of approximately 6,614 square meters. The company stated that the agreement has an estimated value of SAR 395.8 million, excluding VAT, with a 30-month term starting from the issuance of the building permit. **(Argaam)**

Global

India's July services sector growth slides to over four-year low as demand wilts, PMI shows

Growth in India's dominant services sector slumped to its weakest pace in over four years in July as demand was weighed down by fierce competition and fading client appetite, a survey showed. HSBC's India Services Purchasing Managers' Index (PMI), compiled by S&P Global, fell sharply to 53.3 in July from June's 57.4 but was slightly higher than a preliminary estimate of 53.1. PMI readings above 50.0 signal expansion in activity. **(Reuters)**

Commodities

Aramco says US-Iran war has cost the global market 2.6bln barrels of oi

The world has lost more than 2.6 billion barrels of oil since the U.S.-Israeli war with Iran began in February, the head of Saudi oil giant Aramco said, warning that global inventories were running low despite emergency measures to cushion the blow. The lost supply is equivalent to nearly a month of normal global crude production, underscoring the scale of a disruption that has closed major oil chokepoint the Strait of Hormuz, upending energy markets, and shows little sign of easing. **(ZAWYA)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics

		03-Aug	04-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	%
SAUDI TOP	8.4	1.15	16%
SURE	39.36	4.36	12%
MAYAR	3.22	0.33	11%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
AMWAJ INTERNATIONAL	16.2	-1.8	-10%
TAQAT	8.13	-0.65	-7%
MIRAL	103.3	-5.5	-5%

Source: Tadawul

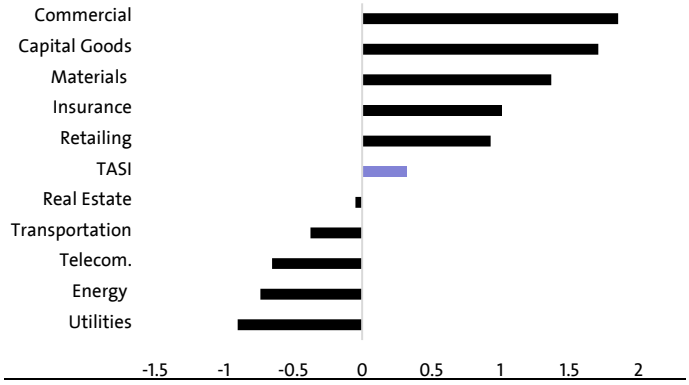
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ASLAK	17.91	1.62	10%
MEDGULF	17	1.4	9%
SPPC	9.2	0.59	7%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALETIHAD	6.92	-0.58	-8%
DALLAH HEALTH	104.9	-6.5	-6%
MUTAKAMELA	12.4	-0.59	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
PETRO RABIGH	16.99	0.02	0%	22.0
SAUDI ARAMCO	26.9	-0.22	-1%	18.7
AMERICANA	2.3	0.02	1%	18.2
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.9	-0.22	-1%	505
PETRO RABIGH	16.99	0.02	0%	377
ALRAJHI	64.3	0.1	0%	293

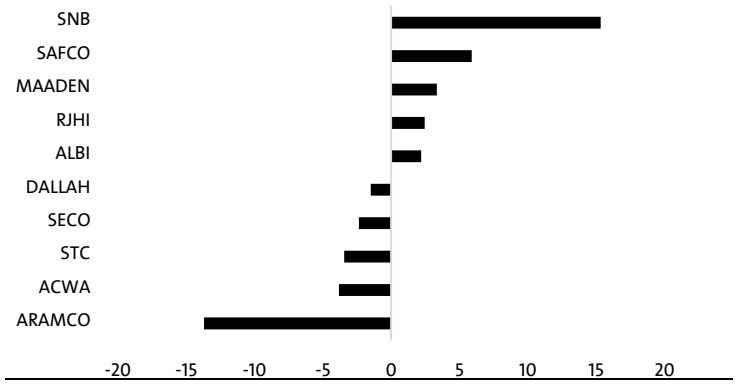
Source: Tadawul

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
05-Aug	BAHRI	Earnings call
05-Aug	SNB	Earnings call
05-Aug	SAL	Ex-dividend Date
06-Aug	MODERN MILLS	Ex-dividend Date
09-Aug	DALLAH HEALTH	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
05-Aug	E.U.	HCOm Eurozone Composite PMI	Jul	51.6	51.6
05-Aug	J.P.	Monetary Policy Meeting Minutes	Jul		
05-Aug	U.S.	Crude Oil Inventories	Jul	0.700M	2.010M
06-Aug	U.S.	Initial Jobless Claims	Jul	201.00K	188.00K
11-Aug	U.S.	Existing Home Sales	Jul	4.19M	4.19M

Source: Bloomberg, Investing.Com

Classification: Private

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