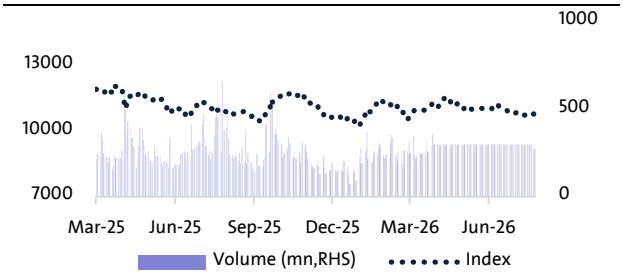
Daily Market Report

Key Indices-Return and Valuation

	14-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10824	-0.2%	2.2%	3%	14.2	1.5
NOMU	21822	0.2%	-0.1%	-7%	0.0	1.5
S&P500	7786	-0.2%	4.0%	14%	21.4	5.9
Dow Jones	53732	-0.2%	2.4%	12%	13.2	6.3
FTSE 100	10750	-0.2%	-1.1%	8%	13.2	2.3
EuroStoxx50	6540	-0.1%	2.9%	13%	16.5	2.6
Nikkei225	68714	0.6%	6.8%	37%	22.9	3.1
MSCI EM	1701	0.3%	2.1%	21%	11.6	2.5
SHCOMP	3927	0.0%	2.5%	-1%	13.9	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
13-Aug	103	153	12	0.7:1

Money Market Yields

%	SAIBOR			Term SOFR		
	13-Aug	Δ bps	YTD Av	14-Aug	Δ bps	YTD Av
1M	4.63	0.4	5.6	3.64	-0.5	4.3
3M	4.81	-1.2	5.4	3.74	-1.5	4.3
6M	5.20	-7.0	5.5	3.85	-2.3	4.2
12M	4.98	3.8	5.2	4.00	-3.3	4.0

Commodities

		14-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	81	0.5	135	60	-13.2
Brent	USDbbl	89	1.7	118	59	-13.0
Gold	USDOz	4376	0.6	5417	3316	-20.7
Silver	USDOz	65	0.3	117	37	-38.9
Aluminum	USDton	3249	-0.5	3851	2560	-15.8
Copper	USDton	14134	0.4	14260	9676	-18.9

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

BinDawood wins bid to acquire Estonian dairy plant assets for SAR 585.9M

BinDawood Holding Co. announced that its wholly owned subsidiary, JUUST & JUBN OÜ, won a bid to acquire assets belonging to AS E-Piim Tootmine in Estonia for SAR 585.85 million (EUR 135.25 million). In a statement to Tadawul, the company stated that the acquisition covers the assets of a dairy products manufacturing plant, including real estate, related operating assets, associated contractual rights, and ownership interests in investee entities. **(Argaam)**

SMASCO sees demand rebound in individuals segment, corporate growth in H2 2026

Abdullah Altimyat, CEO of Saudi Manpower Solutions Co. (SMASCO), expects the second half of 2026 to follow the usual seasonal patterns, with varying demand levels across the individuals and corporate segments. **(Argaam)**

Saudi Ceramics opens new showroom in Jeddah

Saudi Ceramic Co. (Saudi Ceramics) opened a new showroom today, Aug. 16, in Al-Naeem district, Jeddah, offering its main products, including ceramic and porcelain tiles, sanitary ware, and water heaters. In a statement to Tadawul, the company said the opening brings the total number of its retail showrooms across Saudi Arabia to 70. **(Argaam)**

MIS signs SAR 80.9M project contract with CMA

Al Moammar Information Systems Co. (MIS) signed a SAR 80.88 million contract with the Capital Market Authority (CMA) on Aug. 13, inclusive of value-added tax (VAT). The term of the project is 36 months and the financial impact of the project will start appearing from 4Q2026. **(Argaam)**

SVCP amends capital cut plan due to higher accumulated losses

Saudi Vitrified Clay Pipes Co. (SVCP) board of directors decided on Aug. 13 to amend its recommendation to reduce the company's capital and subsequently increase it through a rights issue. According to a statement on Tadawul, the amendment followed a rise in total accumulated losses reported in the preliminary financial results for the period ended June 30, 2026. **(Argaam)**

Global

US retail sales post first decline in nine months in July

U.S. retail sales fell in July for the first time in nine months as the boost from big tax refunds faded, suggesting that consumer spending was slowing down and prompting economists to slash their economic growth estimates for the third quarter. **(Reuters)**

Cooler inflation data may force Warsh's divided Fed to hold the line on rates

Kevin Warsh took over as head of the Federal Reserve in May with monetary policy at a crossroads, officials divided over whether they would need to hike interest rates to control inflation and President Donald Trump demanding lower rates to stimulate the economy. Recent data, however, may have set up the U.S. central bank for an extended do-nothing stance. **(Reuters)**

Commodities

Oil ends higher, records weekly gains

Oil prices rose at Friday's settlement, with Brent posting a weekly gain of nearly 6% amid renewed attacks on tankers in the Middle East and competing claims by the United States and Iran over control of the Strait of Hormuz. US Treasury Secretary Scott Bessent said Washington could maintain its naval blockade of Iran indefinitely and step up economic pressure on Tehran in response to stalled ceasefire talks. **(Argaam)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics

		12-Aug	13-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2269	2271	0.1%	2.4%	1.9%
Value	mn	4863	5063	4.1%	0.7%	1.0%
Volume	mn	252	254	0.9%	0.8%	3.7%
NOMU						
Market Cap	mn	6990	7026	0.5%	-0.2%	-7.4%
Value	mn	18.8	28.9	53.3%	61.1%	33.8%
Volume	mn	2.5	2.8	11.0%	20.8%	20.1%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ARABICA STAR	25.98	1.98	8%
THARWAH	27.98	1.98	8%
QOMEL	48	3	7%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
GHIDA ALSULTAN	16.75	-1.84	-10%
ALHASOOB	36.1	-3.3	-8%
TAQAT	8.01	-0.65	-8%

Source: Tadawul

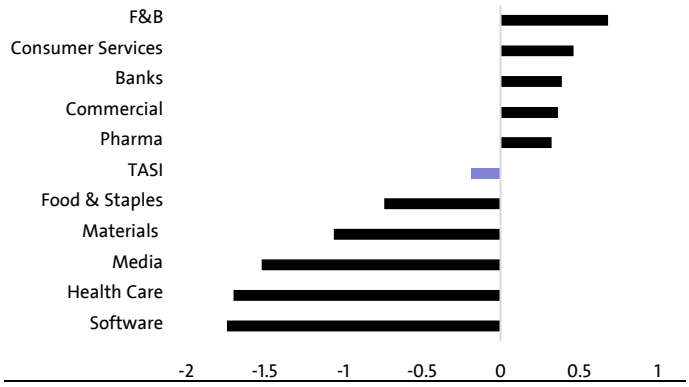
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
CENOMI RETAIL	13.69	1.24	10%
ALAMAR	42.6	2.42	6%
MIS	306	15.4	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALWASAIL INDUSTRIAL	3.16	-0.14	-4%
MOUWASAT	61.2	-2.7	-4%
SFICO	64.45	-2.8	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.4	0.02	1%	31.7
BJAZ	11.83	-0.37	-3%	17.4
PETRO RABIGH	17.7	0.1	1%	9.6
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	64.05	0	0%	205
BJAZ	11.83	-0.37	-3%	203
SAUDI ARAMCO	26.48	-0.12	0%	198

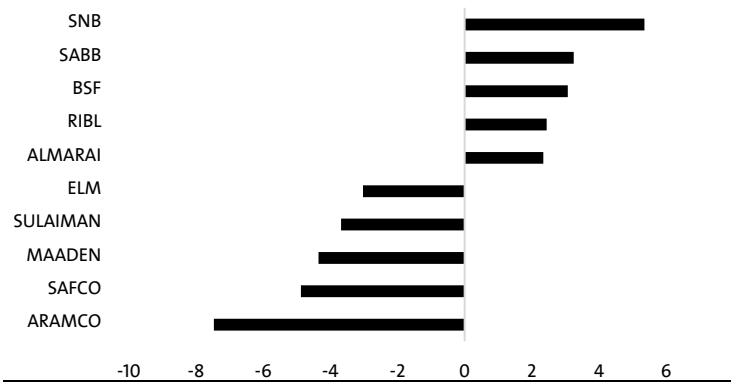
Source: Tadawul

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
16-Aug	ALMODAWAT	Ex-dividend Date
16-Aug	ALHAMMADI	Ex-dividend Date
17-Aug	JARIR	Ex-dividend Date
18-Aug	MAHARAH	Ex-dividend Date
18-Aug	ALMAWARID	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
19-Aug	E.U.	Consumer Price Index (CPI) YoY	Jul	2.9%	2.8%
25-Aug	U.S.	Consumer Confidence	Jul	92.4	92.2
26-Aug	U.S.	Gross Domestic Product (GDP) YoY	Jul	2.1%	2.1%
31-Aug	C.N.	Manufacturing PMI	Aug	50.1	50.3
01-Sep	U.S.	JOLTS Job Openings	Aug	7.440M	7.537M

Source: Bloomberg, Investing.Com

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