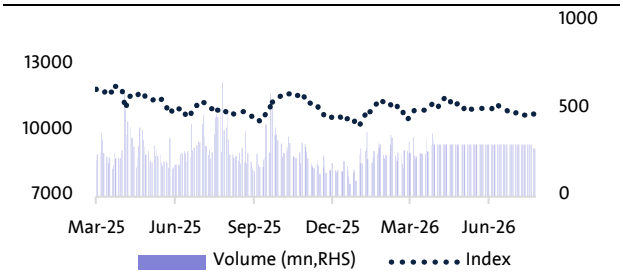
Daily Market Report

Key Indices-Return and Valuation

	17-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10908	-0.1%	3.0%	3%	14.3	1.5
NOMU	21516	-0.7%	-1.5%	-9%	0.0	1.5
S&P500	7745	-0.5%	3.4%	13%	21.3	5.9
Dow Jones	53460	-0.5%	1.9%	11%	13.2	6.3
FTSE 100	10720	-0.3%	-1.4%	8%	13.2	2.3
EuroStoxx50	6530	-0.1%	2.7%	13%	16.5	2.6
Nikkei225	69220	0.7%	7.5%	38%	23.0	3.1
MSCI EM	1710	0.5%	2.6%	22%	11.6	2.4
SHCOMP	3983	1.4%	3.9%	0%	14.1	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
17-Aug	124	134	12	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	17-Aug	Δ bps	YTD Av	17-Aug	Δ bps	YTD Av
1M	4.60	-2.8	5.6	3.64	-0.5	4.3
3M	4.74	-7.0	5.4	3.74	-1.5	4.3
6M	5.24	4.1	5.5	3.85	-2.3	4.2
12M	4.98	0.0	5.2	4.00	-3.3	4.0

Commodities

		17-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	83	1.9	135	60	-13.3
Brent	USDbbl	91	2.7	118	59	-13.1
Gold	USDOz	4416	0.9	5417	3316	-20.8
Silver	USDOz	66	1.7	117	37	-39.0
Aluminum	USDton	3261	0.4	3851	2560	-15.9
Copper	USDton	14315	1.3	14260	9676	-19.0

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

PIF expects more IPOs in coming years

Yasser Al-Salman, Head of the General Finance Administration at the Public Investment Fund, said the fund is preparing for new debt-market issuances, which is expected to take place early next year. He also expects more companies to be listed over the coming years. In an interview with Asharq Bloomberg, Al-Salman added that the fund is working with the Capital Market Authority on any company that is ready for an IPO and is preparing the relevant offering file. **(Bloomberg)**

Retal subsidiary signs SAR 268M contract with Remal Park Fund

Building and Construction Co. Ltd., an 80%-owned subsidiary of Retal Urban Development Co., signed a SAR 267.98 million contract with Remal Park Fund (an associate), excluding taxes and fees. The contract has a 12-month term from the effective date of the agreement and covers design and construction works for the Remal Business Court project in Al Khobar. **(Argaam)**

BinDawood Holding acquires 51% of Wonder Bakery for AED 114.8M

BinDawood Holding Co. said it completed procedures to acquire 51% of UAE-based Wonder Bakery LLC and the consideration will be paid as agreed under the sale and purchase agreement (SPA), The regulatory measures related to the ownership transfer were also finalized, the statement added. The total value of the acquisition amounted to AED 114.8 million. **(Argaam)**

Saudi crude oil output reaches 3.46B barrels in 2025; exports at 2.35B

Saudi Arabia's crude oil production reached around 3.46 billion barrels in 2025, up 5.6% from a year earlier. Crude output rebounded last year after falling in 2024 to its lowest level in 14 years, On refined products, Saudi Arabia's gas oil/diesel production rose 6% year-on-year (YoY) to 432.2 million barrels in 2025, while gasoline output increased 1.6% to 242 million barrels. **(Argaam)**

Maaden unit, SABIC AN sign MoU to explore cooperation, investment opportunities

Saudi Arabian Mining Co. (Maaden) subsidiary, Maaden Integrated Fertilizer Co., and SABIC Agri-Nutrients Co. (SABIC AN) signed on Aug. 17 a memorandum of understanding (MoU) to evaluate and explore cooperation and joint investment opportunities. **(Argaam)**

Global

UK labour market shows more signs of slowing in the second quarter

Britain's labour market cooled somewhat in the second quarter, which was marked by slowing earnings growth in the private sector and the smallest number of vacancies in more than five years, official data showed on Tuesday. Private sector regular earnings — watched by the BoE as a gauge of domestic inflation pressure — rose by 2.8% in the annual terms during the three months to June, marking the weakest growth since the three months to October 2020. **(Reuters)**

Dollar feeble as rate hike bets dwindle, Iran war worries jolt bonds

The U.S. dollar held near multi-month lows against most major currencies on Tuesday as traders walked back expectations of near-term monetary tightening, although the imminent threat of an escalation in the Middle East war left sentiment fragile. **(Reuters)**

Commodities

Oil climbs as fading US-Iran peace hopes raise supply risks

Oil prices rose on Tuesday as prospects receded for a deal to end the Middle East war, with Iran saying it would adopt a more offensive stance and the United States ruling out extension of a ceasefire deal, heightening worries about energy supply. **(Reuters)**

Please refer to page III for important disclosures

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics

		16-Aug	17-Aug	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2287	2285	-0.1%	3.0%	2.5%
Value	mn	3403	4327	27.1%	-8.9%	-13.3%
Volume	mn	190	257	35.1%	3.7%	4.7%
NOMU						
Market Cap	mn	6990	6941	-0.7%	-1.5%	-8.5%
Value	mn	10.0	11.4	14.7%	-24.4%	-46.2%
Volume	mn	1.5	1.3	-8.4%	-33.0%	-41.2%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NAF	6.98	1.19	21%
ARABICA STAR	25.5	2.1	9%
ALASHGHAL ALMOYSRA	16.74	1.14	7%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALBABTAIN FOOD	25.22	-2.76	-10%
EDARAT	251.8	-26.2	-9%
MSGA	5.62	-0.48	-8%

Source: Tadawul

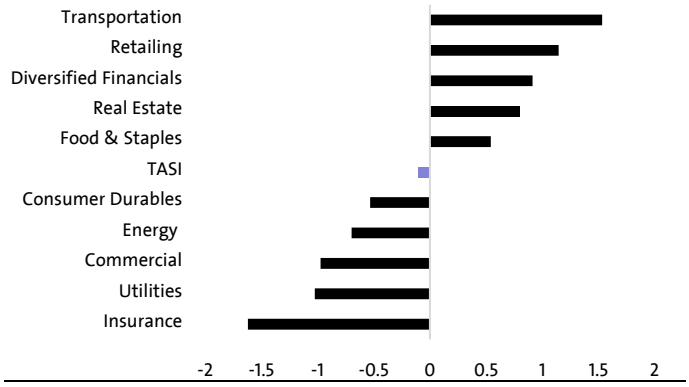
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
RAYDAN	17.6	1.6	10%
PETRO RABIGH	18.2	0.97	6%
KINGDOM	14.08	0.64	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALKATHIRI	1.17	-0.13	-10%
AMAK	83.5	-4	-5%
SENAAT	25.96	-1.12	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.44	-0.01	0%	35.6
ALKATHIRI	1.17	-0.13	-10%	26.0
PETRO RABIGH	18.2	0.97	6%	11.3
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.52	-0.22	-1%	265
ALRAJHI	64.65	-0.35	-1%	259
PETRO RABIGH	18.2	0.97	6%	203

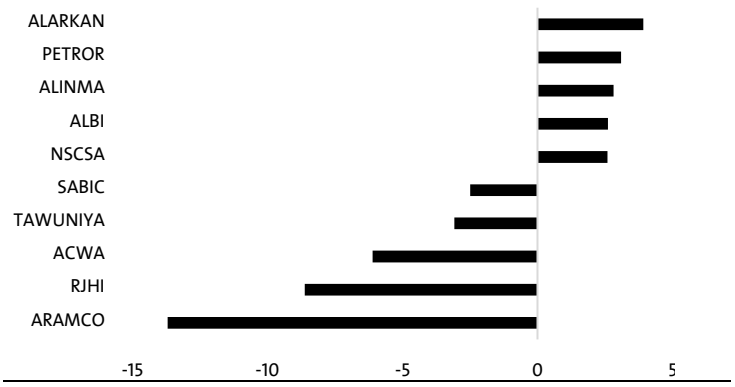
Source: Tadawul

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
18-Aug	MAHARAH	Ex-dividend Date
18-Aug	ALMAWARID	Ex-dividend Date
19-Aug	SAUDI ARAMCO	Ex-dividend Date
19-Aug	ALAMAR	Ex-dividend Date
20-Aug	FOURTH MILLING	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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