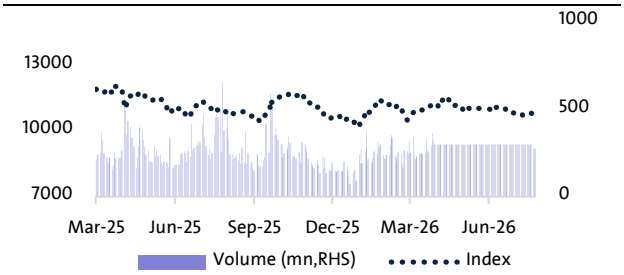
# Daily Market Report

## Key Indices-Return and Valuation

| | 30-Aug* | DoD | MTD | YTD | P/E | P/BV |
|---|---|---|---|---|---|---|
| TASI | 11238 | -0.2% | 6.1% | 7% | 14.7 | 1.5 |
| NOMU | 21798 | -0.1% | -0.2% | -7% | 0.0 | 1.5 |
| S&P500 | 7712 | -0.2% | 3.0% | 13% | 21.1 | 5.7 |
| Dow Jones | 53560 | 0.0% | 2.0% | 11% | 13.3 | 5.9 |
| FTSE 100 | 10824 | 0.3% | -0.4% | 9% | 13.3 | 2.3 |
| EuroStoxx50 | 6486 | 0.9% | 2.0% | 12% | 16.4 | 2.5 |
| Nikkei225 | 66406 | 0.4% | 3.2% | 32% | 22.0 | 2.9 |
| MSCI EM | 1722 | 0.0% | 3.4% | 23% | 11.6 | 2.5 |
| SHCOMP | 3952 | -0.1% | 3.1% | 0% | 14.0 | 1.5 |

## TASI- Index and Volume Trends




## Advance to Decline Ratio

| | Advance | Decline | Unchanged | A/D |
|---|---|---|---|---|
| 30-Aug | 90 | 172 | 8 | 0.5:1 |

## Money Market Yields

| % | SAIBOR | | | Term SOFR | | |
|---|---|---|---|---|---|---|
| | 28-Aug | Δ bps | YTD Av | 28-Aug | Δ bps | YTD Av |
| 1M | 4.71 | 8.6 | 5.6 | 3.69 | 0.1 | 4.3 |
| 3M | 4.76 | -3.9 | 5.4 | 3.76 | -0.3 | 4.3 |
| 6M | 5.31 | -4.8 | 5.5 | 3.87 | 0.1 | 4.2 |
| 12M | 5.06 | 1.4 | 5.2 | 4.02 | 0.7 | 4.0 |

## Commodities

| | | 28-Aug | Δ | 52-week | | YTD Av |
|---|---|---|---|---|---|---|
| | Unit | USD | % | Hi | low | %Δ |
| Arab Light | USDbbl | 85 | 1.7 | 135 | 60 | -13.8 |
| Brent | USDbbl | 89 | -0.4 | 118 | 59 | -14.0 |
| Gold | USDOz | 4455 | -3.1 | 5417 | 3448 | -21.5 |
| Silver | USDOz | 66 | -4.1 | 117 | 40 | -39.9 |
| Aluminum | USDton | 3234 | 0.2 | 3851 | 2595 | -16.5 |
| Copper | USDton | 14370 | 0.9 | 14336 | 9862 | -20.0 |

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

### Armah to debut on TASI at SAR 55/share today

Armah Sports Co. will list and start trading on the Main Market (TASI) today, Aug. 30, under the symbol (6022) in the consumer services sector with a daily price fluctuation limit of 10%. On Aug. 9, Tadawul approved Armah's application to transition from the Nomu-Parallel Market to TASI. **(Argaam)**

### Derayah commits SAR 244M to AI, tech-focused fund

Derayah Financial Co. entered into a binding investment commitment of SAR 244 million ($65 million) in HOF Capital Strategic Opportunities Fund II (Cayman). The company said it paid 40% of the total commitment, or SAR 97.5 million ($26 million), upon closing on Aug. 28, 2026. The remaining 60% will be paid over the following 24 months, with the payment schedule and amounts subject to adjustment based on the fund's requirements. **(Argaam)**

### 2P awarded SAR 73.7M project with Jeddah Municipality

Perfect Presentation for Commercial Services Co. (2P) was awarded a tender for the operation and maintenance of cybersecurity devices and systems for Jeddah Municipality, at a total value of SAR 73.7 million, inclusive of VAT. **(Argaam)**

### Al Majdiah, SOM partner to develop, design high-end projects

Dar Al Majed Real Estate Co. (Al Majdiah) signed a strategic cooperation agreement with global architecture and engineering firm Skidmore, Owings & Merrill (SOM) to develop and design high-end projects. **(Argaam)**

### Knowledge Tower wins Maarif Education contract

Knowledge Tower Trading Co. won a contract from Maarif Education Co. on Aug. 27 to supply educational books and curricula for the 2026/2027 academic year. The total value of purchase orders for the 2026/2027 academic year has reached SAR 20.40 million to date. **(Argaam)**

### Americana signs exclusive agreement to launch Taco Bell in UAE

Americana Restaurants International signed an exclusive development agreement with Taco Bell UK and Europe Limited, a subsidiary of Yum! Brands, to launch the Taco Bell brand in the UAE. The company said in a statement that the agreement extends its partnership with Yum! Brands, which includes operating KFC and Pizza Hut in several markets across the region. **(Argaam)**

## Global

### Warsh raises stakes for Fed's next meeting & other takeaways from Jackson Hole conference

Federal Reserve Chair Kevin Warsh renewed his inflation-fighting credentials in a speech Frida y that opened the door to potential rate hikes in the coming months. In doing so, Warsh has put more pressure on the central bank to increase interest rates when it next meets in mid-September if inflation doesn't improve. The government's next price report, to be released just days before the meeting, could play an outsize role in determining whether the central bank acts. **(AP)**

## Commodities

### Oil settles lower, posts weekly losses of over 5%

Oil prices fell at Friday's settlement, posting weekly losses as market participants assessed hawkish signals from the Federal Reserve, alongside hopes that diplomatic efforts could succeed in fully reopening the Strait of Hormuz. The latest round of the U.S.-Iran war entered its sixth month on Friday with no clear path toward a settlement, as U.S. President Donald Trump reiterated that he does not want to return to negotiations. **(Argaam)**

Please refer to page III for important disclosures



Classification: Private

# Daily Market Report

## TASI & NOMU- Key Statistics

| | | 27-Aug | 30-Aug | Δ% | | |
|---|---|---|---|---|---|---|
| **TASI** | SAR | | | DoD | MTD* | YTD* |
| Market Cap | bn | 2358 | 2354 | -0.2% | 6.1% | 5.6% |
| Value | mn | 5707 | 5075 | -11.1% | 2.9% | 1.5% |
| Volume | mn | 306 | 245 | -20.1% | -3.1% | -0.5% |
| **NOMU** | | | | | | |
| Market Cap | mn | 7040 | 7032 | -0.1% | -0.2% | -7.3% |
| Value | mn | 25.9 | 17.0 | -34.6% | -15.7% | -21.5% |
| Volume | mn | 3.5 | 2.3 | -36.0% | -20.9% | -5.6% |

*Average for the period, Source: Argaam

| NOMU-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| SMC | 9.79 | 1.07 | 12% |
| PRO MEDEX | 92 | 9 | 11% |
| HAWYIA | 13 | 1.09 | 9% |
| **NOMU-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| MOLAN | 0.88 | -0.18 | -17% |
| ALFAKHERA | 7.41 | -0.7 | -9% |
| NBM | 45.02 | -3.88 | -8% |

Source: Tadawul

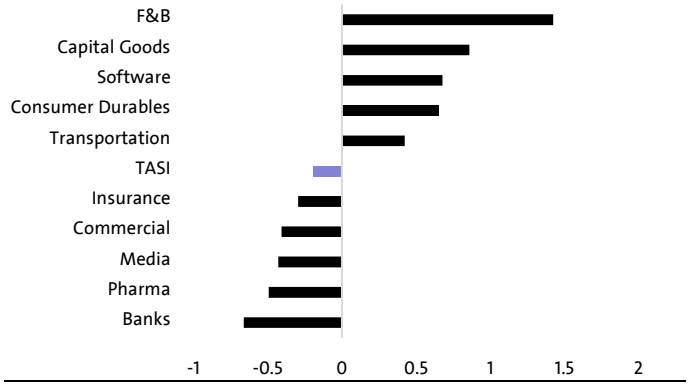
| TASI-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| NASEEJ | 19.64 | 1.78 | 10% |
| SFICO | 72.8 | 6.6 | 10% |
| BAWAN | 38.04 | 2.1 | 6% |
| **TASI-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| NORTHERN CEMENT | 6.79 | -0.39 | -5% |
| PETRO RABIGH | 16.64 | -0.71 | -4% |
| TASNEE | 9.11 | -0.36 | -4% |

Source: Tadawul

| TASI -Most Traded by Volume | Last Price | Change | | Volumes |
|---|---|---|---|---|
| | SAR/sh | SAR | % | mn |
| AMERICANA | 2.46 | 0.1 | 4% | 17.3 |
| MIAHONA | 11.51 | -0.07 | -1% | 7.1 |
| PETRO RABIGH | 16.64 | -0.71 | -4% | 5.8 |
| **TASI -Most Traded by Value** | **Last Price** | **Change** | | **Value** |
| | SAR/sh | SAR | % | SARmn |
| ALRAJHI | 67.8 | -0.5 | -1% | 352 |
| SAUDI ARAMCO | 26.14 | 0.04 | 0% | 132 |
| SFICO | 72.8 | 6.6 | 10% | 127 |

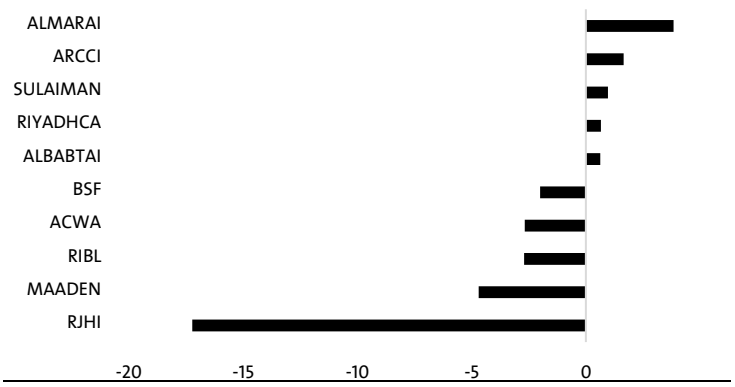
Source: Tadawul

### 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 |
|---|---|---|
| 01-Sep | AVALON PHARMA | Ex-dividend Date |
| 02-Sep | GO TELECOM | Ex-dividend Date |
| 03-Sep | MESC | Earnings call |
| 03-Sep | TAWUNIYA | Ex-Bonus Day |
| 06-Sep | YANSAB | Ex-dividend Date |

Source: Argaam, GSTAT

### Global Market Calendar

| Date | Country | Event | Period | Forecast | Previous |
|---|---|---|---|---|---|
| 31-Aug | C.N. | Manufacturing PMI | Aug | 50.1 | 50.3 |
| 01-Sep | U.S. | JOLTS Job Openings | Aug | 7.440M | 7.537M |
| 04-Sep | U.S. | Average Hourly Earnings | Aug | 0.3% | 0.3% |
| 10-Sep | E.U. | Deposit Facility Rate | Aug | 2.25% | 2.25% |
| 11-Sep | U.S. | Consumer Price Index | Aug | 3.4% | 3.5% |

Source: Bloomberg, Investing.Com



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