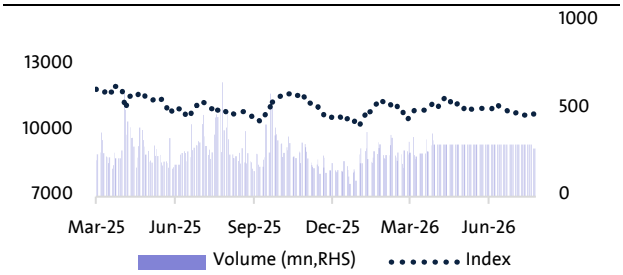
Daily Market Report

Key Indices-Return and Valuation

	19-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10926	0.1%	3.2%	4%	14.3	1.5
NOMU	21573	0.0%	-1.2%	-8%	0.0	1.5
S&P500	7708	0.2%	2.9%	13%	21.2	5.9
Dow Jones	53463	0.2%	1.9%	11%	13.2	6.3
FTSE 100	10743	0.1%	-1.1%	8%	13.2	2.3
EuroStoxx50	6444	-0.4%	1.4%	11%	16.3	2.6
Nikkei225	65326	-3.2%	1.5%	30%	21.6	3.1
MSCI EM	1668	-1.5%	0.1%	19%	11.5	2.4
SHCOMP	3894	-2.4%	1.6%	-2%	13.8	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
19-Aug	96	160	14	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	19-Aug	Δ bps	YTD Av	19-Aug	Δ bps	YTD Av
1M	4.63	-0.2	5.6	3.65	0.5	4.3
3M	4.81	-0.1	5.4	3.73	1.0	4.3
6M	5.31	10.3	5.5	3.84	1.6	4.2
12M	5.00	1.5	5.2	3.98	2.6	4.0

Commodities

		19-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	86	1.8	135	60	-13.3
Brent	USDbbl	92	0.7	118	59	-13.2
Gold	USDOz	4516	4.2	5417	3316	-20.9
Silver	USDOz	67	5.7	117	37	-39.0
Aluminum	USDton	3211	0.1	3851	2560	-16.0
Copper	USDton	13890	-1.3	14315	9676	-19.1

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

Alrajhi Bank launches $1bln 3-year sustainability commodity term loan

Alrajhi Bank, rated Aa3/A/A (Moody's/S&P/Fitch), has launched a $1 billion three-year sustainability commodity murabaha term loan paying 80bps over SOFR. Citigroup, Emirates NBD, Mashreq Al Islami and Sumitomo Mitsui Banking Corp are the global and sustainability financing coordinators, and mandated lead arrangers and bookrunners of the bullet financing, which has an unspecified greenshoe option, LPC added. **(ZAWYA)**

Cenomi Centers signs 2 agreements with Saudi Downtown

Arabian Centres Co. (Cenomi Centers) signed on Aug. 18 two agreements with Saudi Downtown Co., one of Public Investment Fund's units, according to a statement to Tadawul. The first agreement involves development services for retail and shopping center components of the Al Madinah Downtown Project, while the second agreement includes 25-year lease and operation for the shopping center. **(Argaam)**

Purity signs SAR 9.3M cybersecurity contract with Qassim Emirate

Purity for Information Technology Co. (Purity) signed a SAR 9.3 million contract, including VAT, with Qassim Emirate to provide operation, maintenance, and cybersecurity support services for three years. **(Argaam)**

SARCO affiliate signs SAR 100M construction contract

Saudi Arabian Refineries Co. (SARCO) stated that its 35%-owned affiliate, Raya Al-Tajdeed Contracting Co., signed a contract with Multinational Education Co. to carry out construction and finishing works for the latter's projects in Riyadh. In a statement to Tadawul, SARCO said the 24-month contract is estimated at SAR 100 million. The financial impact of the contract is expected to begin showing in Q4 2026, the company said. **(Argaam)**

Baazeem inks SAR 4.6M contract for warehouse construction

Baazeem Trading Co. signed today, Aug. 19, a contract with Al Mammar & Steel Co., at a value of about SAR 4.6 million for building a warehouse for in Khamis Mushait. **(Argaam)**

Global

US debt surpasses $40T for first time in history

US government debt surpassed $40 trillion for the first time ever, as borrowing accelerated to a record pace, raising investor concerns over the country's fiscal position despite President Donald Trump's pledge to rein in government spending. Data released on Wednesday by the US Treasury showed that government debt crossed the threshold on Tuesday, after rising by about $3 trillion over the past year. **(Reuters)**

China's Shanghai eases housing policies to spur demand

China's commercial hub of Shanghai will ease some property policies from Friday, including mortgage, housing provident fund and purchase subsidy measures, in a bid to shore up demand, city authorities said on Thursday. For second homes bought outside the city's outer ring expressway, the minimum down payment for commercial mortgages will be cut to no less than 15% from 20% earlier, the authorities said in a notice. **(Reuters)**

Commodities

Gold hovers near early-June high on lower bond yields

Gold hovered near its highest level in more than two months on Thursday after a surprise liquidity support announcement by the U.S. Treasury pushed yields and the dollar lower. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		18-Aug	19-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2285	2288	0.1%	3.2%	2.6%
Value	mn	4908	3685	-24.9%	-20.6%	-25.9%
Volume	mn	265	198	-25.4%	-18.0%	-19.0%
NOMU						
Market Cap	mn	6963	6959	0.0%	-1.2%	-8.3%
Value	mn	29.0	21.2	-27.1%	23.7%	-1.0%
Volume	mn	2.9	2.7	-6.3%	23.5%	18.3%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NAF	9.1	0.88	11%
TAQAT	7.9	0.7	10%
SURE	40	2.9	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALDAWLIAH	4	-0.39	-9%
MOHAFAZA EDUCATION	24	-2	-8%
WAJA	6.28	-0.52	-8%

Source: Tadawul

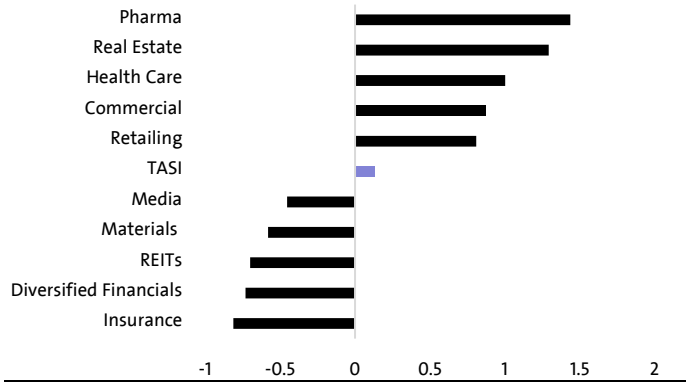
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
CENOMI RETAIL	16.89	1.53	10%
CHEMANOL	32.58	2.34	8%
TADCO	9.41	0.41	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
AMAK	80.3	-3.65	-4%
MARAFIQ	41	-1.52	-4%
LUBEREF	134	-3.5	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.46	0	0%	17.3
PETRO RABIGH	17.9	-0.25	-1%	8.0
ALKATHIRI	1.16	0	0%	7.4
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	64.5	0.1	0%	199
SAUDI ARAMCO	26.64	0.06	0%	179
PETRO RABIGH	17.9	-0.25	-1%	145

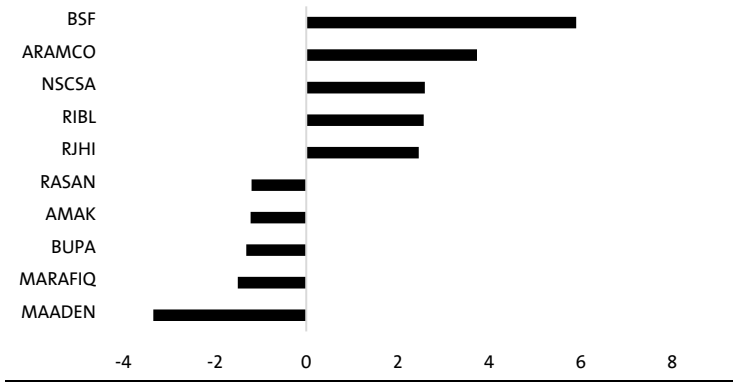
Source: Tadawul

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
20-Aug	FOURTH MILLING	Ex-dividend Date
23-Aug	GASCO HOLDING	Ex-dividend Date
24-Aug	CATRION	Ex-dividend Date
20-Aug	FOURTH MILLING	Ex-dividend Date
24-Aug	CATRION	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
04-Sep	U.S.	Average Hourly Earnings	Aug	0.3%	0.3%

Source: Bloomberg, Investing.Com

Classification: Private

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