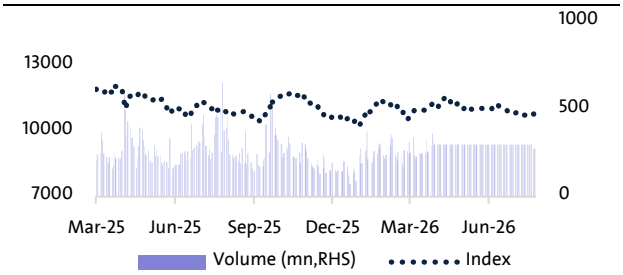
Daily Market Report

Key Indices-Return and Valuation

	21-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	10954	0.3%	3.4%	4%	14.3	1.5
NOMU	21572	0.0%	-1.2%	-8%	0.0	1.5
S&P500	7674	0.4%	2.5%	12%	21.1	5.8
Dow Jones	53277	1.0%	1.5%	11%	13.3	6.2
FTSE 100	10817	0.6%	-0.5%	9%	13.3	2.3
EuroStoxx50	6462	0.6%	1.6%	12%	16.3	2.5
Nikkei225	66016	-0.3%	2.6%	31%	21.9	2.9
MSCI EM	1722	1.3%	3.4%	23%	11.4	2.4
SHCOMP	3905	0.0%	1.9%	-2%	13.8	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
20-Aug	170	90	10	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	20-Aug	Δ bps	YTD Av	21-Aug	Δ bps	YTD Av
1M	4.62	-1.1	5.6	3.66	0.7	4.3
3M	4.77	-4.2	5.4	3.74	0.1	4.3
6M	5.34	14.1	5.5	3.84	0.1	4.2
12M	5.01	2.9	5.2	3.99	0.0	4.0

Commodities

		21-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	92	4.1	135	60	-13.5
Brent	USDbbl	94	0.7	118	59	-13.5
Gold	USDOz	4603	1.9	5417	3366	-21.1
Silver	USDOz	69	1.3	117	39	-39.4
Aluminum	USDton	3226	1.1	3851	2595	-16.2
Copper	USDton	14235	1.9	14315	9726	-19.5

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 real estate deals reach SAR 35.5B in July

The value of real estate transactions in Saudi Arabia decreased by 32% in July 2026 to around SAR 35.5 billion from SAR 51.9 billion in the same month a year earlier. This was driven by a 43% decline in the value of residential transactions to SAR 19.8 billion from around SAR 35 billion in July 2025, in addition to a 7% decline in the value of non-residential transactions to SAR 15.7 billion, according to data from the Real Estate General Authority (REGA). **(Argaam)**

Sector pressures not reflective of fundamental weakness

The recent pressures facing the car rental sector do not reflect any weakness in its fundamentals, but were primarily driven by geopolitical developments, said Fawaz Danish, CEO Budget Saudi. Speaking to Argaam, Danish said the impact was more pronounced at the onset of the events, before individuals & companies gradually adapted and activity began to recover. **(Argaam)**

Acwa's stake in 3 battery energy storage projects at 34.9%

ACWA Power (Acwa) signed agreements to develop, build, and operate three standalone battery energy storage projects, with its stake in each project set at 34.9% upon financial close. According to a statement to Tadawul, the projects, Al-Kahfa, Haden and Al-Muwaiyah, are located in Hail and Makkah regions. Each project has a 500 MW capacity and 2,000 MWh storage capacity. **(Argaam)**

IHR signs SAR 55.6M manpower services contract with NWC

International Human Resources Co. (IHR) signed a manpower services contract with National Water Co. (NWC) worth SAR 55.56 million, excluding VAT, on Aug. 20, according to a statement to Tadawul. The company expects the contract's financial impact to start appearing in Q3 and Q4 2026. **(Argaam)**

Anaam says dues to ZATCA fall to SAR 51.3M

Anam International Holding Group said amounts due to the Zakat, Tax and Customs Authority (ZATCA), comprising SAR 106.93 million in Zakat differences and SAR 138,940 in withholding tax, have been reduced to SAR 51.31 million. **(Argaam)**

Global

UK economy hands Burnham surprise boost before first budget

Britain is showing surprising signs of strength among businesses and consumers, in an early boost for new Prime Minister Andy Burnham, despite the country's vulnerability to high inflation stemming from the Iran war. A closely watched business survey on Friday showed the services sector — the engine of the economy — recorded its best growth in six months, confounding expectations for a slowdown in a Reuters poll of economists. **(Reuters)**

Euro zone consumer confidence rises to -15.5 in August

Euro zone consumer confidence rose by 0.4 points in August from the July number, figures released on Friday showed. The European Commission said a flash estimate showed euro zone consumer morale improved to -15.5 this month from -15.9 in July. **(Reuters)**

Commodities

Oil prices rise, boosts weekly gains to over 6%

Oil prices reversed course to settle higher on Friday, with crude posting a second consecutive weekly gain amid uncertainty over the reopening of the Strait of Hormuz after US President Donald Trump threatened economic sanctions against Iran and its trading partners. **(Argaam)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		19-Aug	20-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2288	2294	0.3%	3.4%	2.9%
Value	mn	3685	5071	37.6%	6.6%	1.7%
Volume	mn	198	257	29.8%	4.4%	4.9%
NOMU						
Market Cap	mn	6959	6959	0.0%	-1.2%	-8.3%
Value	mn	21.2	14.9	-29.4%	-9.9%	-29.8%
Volume	mn	2.7	2.7	-2.4%	19.2%	15.4%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MSGA	6.5	0.5	8%
SHALFA	62	4.3	7%
ANMAT	9.1	0.55	6%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALFAKHERA	6.25	-0.85	-12%
RIYAL	14	-1.5	-10%
ALTWIJRI	16.7	-1.61	-9%

Source: Tadawul

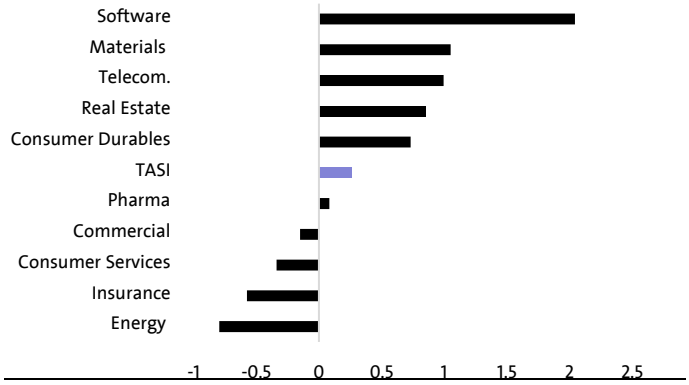
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
AMAK	85.15	4.85	6%
CENOMI RETAIL	17.87	0.98	6%
SHAKER	12.05	0.63	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
WATANIYA	14.7	-0.47	-3%
WALAA	11.08	-0.32	-3%
MUTAKAMELA	12.68	-0.36	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.43	-0.03	-1%	22.2
SAUDI ARAMCO	26.4	-0.24	-1%	12.1
MAHARAH	4.73	0.04	1%	11.0
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	64.8	0.3	0%	606
SAUDI ARAMCO	26.4	-0.24	-1%	319
STC	44.14	0.54	1%	193

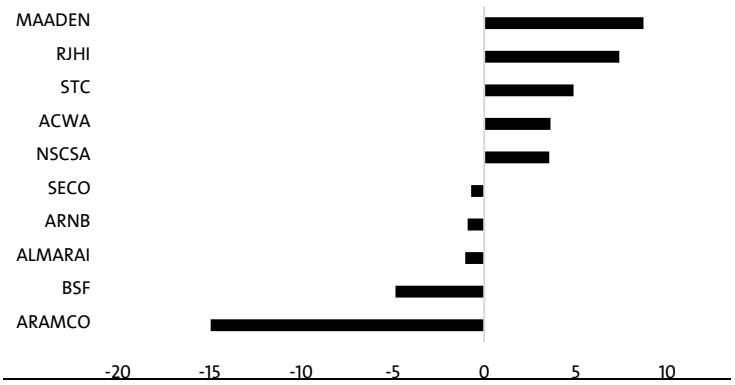
Source: Tadawul

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
23-Aug	GASCO HOLDING	Ex-dividend Date
24-Aug	CATRION	Ex-dividend Date
24-Aug	NOFOTH	Ex-dividend Date
25-Aug	ADES	Ex-dividend Date
25-Aug	ACWA	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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