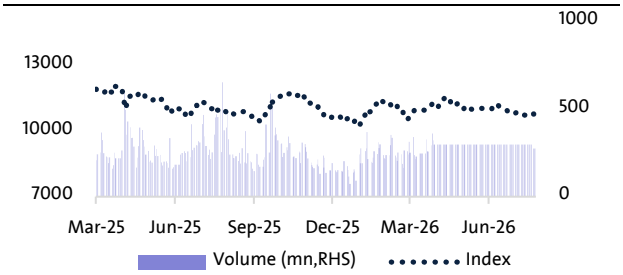
Daily Market Report

Key Indices-Return and Valuation

	23-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11079	1.1%	4.6%	5%	14.3	1.5
NOMU	21647	0.3%	-0.9%	-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
23-Aug	184	64	22	3:1

Money Market Yields

%	SAIBOR			Term SOFR		
	23-Aug	Δ bps	YTD Av	21-Aug	Δ bps	YTD Av
1M	4.62	-0.9	5.6	3.66	0.7	4.3
3M	4.77	-4.1	5.4	3.74	0.1	4.3
6M	5.34	3.8	5.5	3.84	0.1	4.2
12M	5.01	1.4	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 Construction Cost Index rises 2.3% in July 2026

Saudi Arabia's Construction Cost Index (CCI) rose by 2.3% year-on-year (YoY) in July 2026, according to data released by the General Authority for Statistics (GASTAT). The index hit 104 points (base year 2023), up from 101.7 points in July 2025, said the authority. **(Argaam)**

Maaden secures first $1B international syndicated loan facilities

Saudi Arabian Mining Co. (Maaden) completed the necessary arrangements to secure its first international syndicated term loan and revolving credit facility, with a combined value of $1 billion. The deal attracted strong support from the international banking sector, with commitments from leading banks across major financial markets in the US, Canada, Europe, China and Japan, while demand significantly exceeded the targeted amount. **(Argaam)**

FTSE Russell announces quarterly review

The global index provider FTSE Russell announced its quarterly review of Saudi Arabia Free Index Series, which will take effect on Sept. 21. The index provider has upgraded one stock in the Mid-Cap and TSE Global Equity Index (Rasan), downgrade one stock from Mid-Cap to Small-Cap (Al Arabia), downgrade one stock from Small Cap to Micro-Cap (2P), included five stocks in Micro-Cap (Alwasail, CMCER, Gsa, Nofoth, Saleh Alrashed) and excluded two stocks from Micro-Cap (ACIG, Thimar). **(Argaam, AIC)**

Investment licenses in Saudi Arabia jump 252% to 9,018 in Q2 2026

The Ministry of Investment issued nearly 9,018 licenses in Q2 2026, jumping 252% year-on-year (YoY). The Ministry said the increase reflects growing investor confidence and the continued attractiveness of the Kingdom's investment environment, supporting the objectives of Saudi Vision 2030 to position the Kingdom as a leading investment destination, according to the Economic and Investment Monitor report. **(Argaam)**

Foreign institutions net sellers of SAR 176M on TASI last week

Foreign institutions on the Main Market (TASI) were net sellers of stocks worth SAR 175.9 million during the week ended Aug. 20, the Saudi Exchange (Tadawul) said in its latest weekly report. Foreign institutions accounted for 34.61% of total buy transactions and 35.43% of total sell trades on TASI. Saudi retail investors were net sellers of shares worth SAR 279.4 million, comprising SAR 283.9 million by high-net-worth investors, SAR 242.2 million by individual investors, SAR 38.4 million by individual DPMs. Meanwhile, individual professional investors recorded net buys of SAR 285.1 million. **(Argaam)**

Global

US vows 'economic D-Day' as Iran threatens to halt all oil exports

The U.S. threatened Iran with what it called "the greatest financial offensive ever marshalled" as it prepared to roll out economic sanctions on Monday that target Iran's trade partners. Iran in turn vowed to shut down all oil exports from the Gulf "if the economic war continues." **(Reuters)**

Commodities

Oil falls as US prepares to unveil new Iran sanctions

Oil prices slipped more than $1 a barrel on Monday as investors took profits ahead of an expected announcement from Washington about imposing more sanctions on Iran that may further disrupt supplies from the Middle East.

Brent crude futures fell $1.23, or 1.3%, to $93.16 by 0329 GMT, while U.S. West Texas Intermediate crude was at $85.7 a barrel, down $1.36, or 1.6%. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		20-Aug	23-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2294	2320	1.1%	4.6%	4.1%
Value	mn	5071	41	-99.2%	-99.0%	-99.2%
Volume	mn	257	221	-14.2%	-9.0%	-9.8%
NOMU						
Market Cap	mn	6959	6983	0.3%	-0.9%	-8.0%
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	%
NAF	11	2.31	27%
ALDAWLIAH	4.64	0.64	16%
RAWASI	4.06	0.36	10%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
DRC	18.6	-1.93	-9%
NAAS PETROL	27.22	-2.76	-9%
LEAF	20	-2	-9%

Source: Tadawul

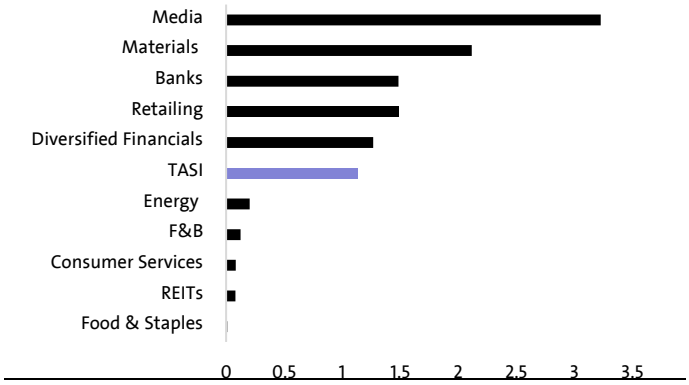
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SVCP	19.4	1.76	10%
BAHRI	37.3	3.22	9%
AZM	25.08	1.62	7%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MRNA	8.04	-0.4	-5%
JADWA REIT ALHARAMAIN	4.84	-0.13	-3%
TADCO	9.03	-0.21	-2%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.41	-0.02	-1%	14.3
BATIC	2.04	0.01	0%	12.3
BAHRI	37.3	3.22	9%	11.4
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	66.15	1.35	2%	727
BAHRI	37.3	3.22	9%	415
ALINMA	25.22	0.36	1%	166

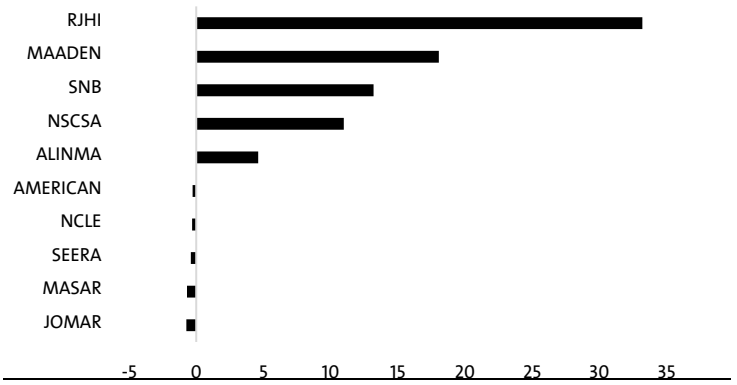
Source: Tadawul

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
24-Aug	CATRION	Ex-dividend Date
24-Aug	NOFOTH	Ex-dividend Date
25-Aug	ADES	Ex-dividend Date
25-Aug	ACWA	Ex-dividend Date
26-Aug	MSGA	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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