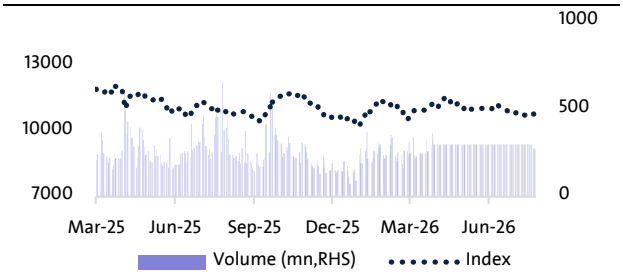
Daily Market Report

Key Indices-Return and Valuation

	25-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11232	0.5%	6.1%	6%	14.7	1.5
NOMU	21622	-0.1%	-1.0%	-8%	0.0	1.5
S&P500	7677	0.3%	2.5%	12%	21.1	5.8
Dow Jones	53577	0.3%	2.1%	11%	13.4	6.2
FTSE 100	10886	0.3%	0.2%	10%	13.4	2.4
EuroStoxx50	6456	0.1%	1.5%	11%	16.3	2.5
Nikkei225	65856	0.5%	2.3%	31%	21.8	2.9
MSCI EM	1704	0.6%	2.3%	21%	11.4	2.5
SHCOMP	3889	0.2%	1.5%	-2%	13.7	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
25-Aug	174	83	13	2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	25-Aug	Δ bps	YTD Av	25-Aug	Δ bps	YTD Av
1M	4.64	2.2	5.6	3.68	1.6	4.3
3M	4.81	4.5	5.4	3.76	1.4	4.3
6M	5.28	-6.4	5.5	3.86	1.8	4.2
12M	5.07	5.5	5.2	4.01	2.6	4.0

Commodities

		25-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	85	-4.5	135	60	-13.6
Brent	USDbbl	89	-3.9	118	59	-13.6
Gold	USDOz	4657	0.1	5417	3366	-21.2
Silver	USDOz	69	-0.4	117	39	-39.5
Aluminum	USDton	3222	0.3	3851	2595	-16.2
Copper	USDton	14298	0.4	14315	9726	-19.6

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

Aramco signs $3.7B deals with French companies

Saudi Aramco signed agreements and a memorandum of understanding (MoU) with French companies, with a potential total value exceeding $3.7 billion (approximately SAR 13.8 billion). The partnerships focus on supporting projects, developing capabilities, transferring technology and innovation, and enhancing supply chain resilience. They include a corporate procurement agreement for drilling equipment, as well as a procurement agreement for oil and gas sector pipes. **(Argaam)**

Tadawul, Muqassa introduce structural enhancements to derivatives market

The Saudi Exchange (Tadawul) and Securities Clearing Center Co. (Muqassa) introduced a package of structural enhancements to the Saudi derivatives market as part of efforts to develop and activate market mechanisms in line with investors' needs. The enhancements target MT30 Index Futures and Single Stock Futures, with the aim of boosting liquidity and market efficiency and broadening participation among institutional and retail investors. **(Argaam)**

MIS expands AI data center project scope with HUMAIN

Al Moammar Information Systems Co. (MIS) announced that it received yesterday, Aug. 25, a letter of award from HUMAIN covering an expansion in the scope of a project to design and build a data center dedicated to AI technologies, increasing the project's capacity from 50 megawatts to 250 megawatts. MIS added the total contract value following the increase to 250 MW exceeds 689% of the company's total revenue for 2025. **(Argaam)**

Tibbiyah unit wins SAR 67.9M MNGHA supply contract

Arabian International Healthcare Holding Co. (Tibbiyah) said its wholly owned subsidiary, International Medical Supplies Co. (Premma Health), won a SAR 67.87 million contract to supply orthopedic and spine products to the Ministry of National Guard Health Affairs (MNGHA). **(Argaam)**

Equipment House bags SAR 24.4M medical services project

Scientific and Medical Equipment House Co. (Equipment House) said it won a SAR 24.4 million, including VAT, project to provide supporting clinical medical services and equipment maintenance for the clinics and laboratories of King Khalid University Dental Hospital. **(Argaam)**

Global

Interest rates must rise further on inflation risks

European Central Bank board member Isabel Schnabel said interest rates must rise further as the conflict in the Middle East drags on and the strong euro zone economy poses upside risks to inflation, in an interview with Bloomberg News published on Wednesday. "At the current policy rate, inflation is unlikely to return to target over the medium term, and therefore further tightening will be necessary," Schnabel said. **(Bloomberg)**

Commodities

Oil prices fall $2 on Iran-Oman talks to reopen Strait of Hormuz

Oil prices fell more than $2 a barrel on Wednesday as talks between Iran and Oman revived hopes that the Strait of Hormuz could reopen and remove shipping constraints affecting supply in the key Middle East region. Brent crude futures fell $2.30, or 2.6%, to $86.28 a barrel by 0447 GMT, earlier dropping to their lowest since August 13. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		24-Aug	25-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2340	2352	0.5%	6.1%	5.5%
Value	mn	6014	6098	1.4%	23.5%	21.9%
Volume	mn	303	300	-1.1%	18.5%	21.9%
NOMU						
Market Cap	mn	6983	6975	-0.1%	-1.0%	-8.1%
Value	mn	16.5	51.9	213.4%	137.6%	137.6%
Volume	mn	3.2	7.8	141.8%	148.6%	222.5%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
DRC	21.86	2.86	15%
ASAS MAKEEN	20.8	1.82	10%
APICO	52.3	4.16	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
BENA	30.6	-3.2	-9%
DKHOUN	59.05	-5.95	-9%
ITMAM	13.34	-1.34	-9%

Source: Tadawul

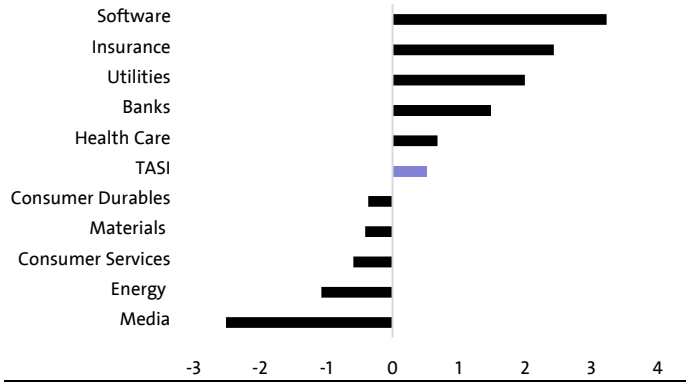
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALKATHIRI	1.27	0.11	9%
MRNA	8.57	0.54	7%
SPPC	8.49	0.53	7%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SRMG	62.1	-2.45	-4%
CENOMI RETAIL	17.8	-0.65	-4%
ALYAMAMAH STEEL	37.36	-1	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
ALKATHIRI	1.27	0.11	9%	20.4
AMERICANA	2.37	0	0%	16.4
BATIC	2.04	0	0%	13.0
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	68.95	1.7	3%	795
SAUDI ARAMCO	26.28	-0.3	-1%	270
ALINMA	25.42	0.18	1%	199

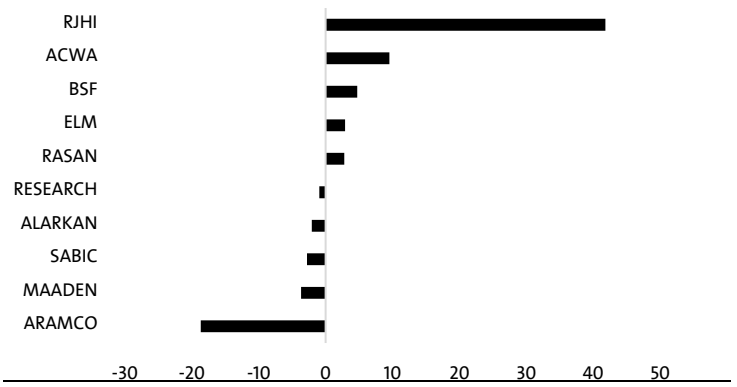
Source: Tadawul

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
26-Aug	MSGA	Ex-dividend Date
27-Aug	NORTHERN CEMENT	Ex-dividend Date
27-Aug	SMASCO	Ex-dividend Date
30-Aug	ALBABTAIN	Ex-dividend Date
30-Aug	SAMA	Reports

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
26-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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