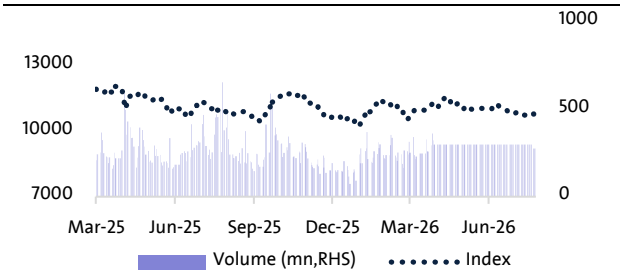
Daily Market Report

Key Indices-Return and Valuation

	25-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11260	0.3%	6.3%	7%	14.7	1.5
NOMU	21824	0.9%	-0.1%	-7%	0.0	1.5
S&P500	7676	0.0%	2.5%	12%	21.1	5.8
Dow Jones	53464	-0.2%	1.9%	11%	13.4	5.8
FTSE 100	10878	-0.1%	0.1%	10%	13.4	2.4
EuroStoxx50	6471	0.2%	1.8%	12%	16.4	2.5
Nikkei225	66262	0.6%	3.0%	32%	21.9	2.8
MSCI EM	1717	0.8%	3.1%	22%	11.5	2.4
SHCOMP	3913	0.6%	2.1%	-1%	13.8	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
26-Aug	169	96	3	1.7:1

Money Market Yields

%	SAIBOR			Term SOFR		
	26-Aug	Δ bps	YTD Av	26-Aug	Δ bps	YTD Av
1M	4.71	9.0	5.6	3.69	0.5	4.3
3M	4.76	-0.6	5.4	3.77	1.1	4.3
6M	5.30	-4.6	5.5	3.88	1.6	4.2
12M	5.01	0.1	5.2	4.03	1.9	4.0

Commodities

		26-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	81	-4.6	135	60	-13.7
Brent	USDbbl	88	-0.8	118	59	-13.7
Gold	USDOz	4591	-1.4	5417	3394	-21.3
Silver	USDOz	68	-0.8	117	39	-39.6
Aluminum	USDton	3218	-0.1	3851	2595	-16.3
Copper	USDton	14336	0.3	14315	9773	-19.7

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 trade surplus falls 10% to SAR 17.3B in June

Saudi Arabia's trade surplus stood at SAR 17.31 billion in June 2026, down about 10% year on year (YoY). The surplus also declined 21% month-on-month (MoM), according to data from the General Authority for Statistics (GASTAT). **(Argaam)**

Saudi Arabia attracts 26% of investors in MENA region during H1 2026

Saudi Arabia is the largest single contributor to the investor base in the Middle East and North Africa (MENA) region, accounting for 26% of total investors during the first half of 2026, according to a report by the MAGNiTT platform. **(Zawya)**

Ladun to begin TASI trading on Aug. 31

Ladun Investment Co. will start trading on the Main Market (TASI) as of Aug. 31, under the symbol 4328 in the real estate management and development sector, with a 10% daily price fluctuation limit per share. **(Argaam)**

Inmar signs SAR 1B MoU with Al Rajhi Capital to explore 3 funds

Inmar Co. for Real Estate Development and Investment signed a memorandum of understanding (MoU) with Al Rajhi Capital on Aug. 26, to explore the establishment of three investment funds with a combined value of SAR 1 billion. In a statement on Tadawul, the company said the MoU sets out a framework for cooperation between the two parties to assess the feasibility of establishing real estate investment funds.. **(Argaam)**

MIS eyes 20% of data center construction opportunities: CEO

Abdullah Al Ghamdi, CEO of Al Moammar Information Systems (MIS), said the HUMAIN project will be financed through a combination of bank facilities from several lenders and an agreed collection schedule linked to project execution and completion milestones. He added that this structure will reduce pressure on working capital during peak execution periods **(Argaam)**

Global

BOJ deputy chief calls for timely rate hike, focus on inflation risk

Bank of Japan Deputy Governor Ryozo Himino on Thursday stressed the need for timely interest rate hikes with a focus on the risk of an inflation overshoot, reinforcing dominant market expectations for a near-term increase in borrowing costs. **(Reuters)**

Hong Kong home prices soft in July, first decline in 16 months

Private home prices in Hong Kong eased 0.5% in July, the first decline since March 2025, data from the Rating and Valuation Department showed on Thursday. The fall followed June's revised monthly gain of 0.2%. Prices have risen 7.3% in the first seven months of the year and 12.8% since the last trough in March 2025. **(Reuters)**

Commodities

Oil extends losses on hopes for Middle East talks to ease supply woes

Oil prices fell on Thursday, extending a streak of losses, on expectations that talks between Iran and Qatar might open the Strait of Hormuz and reduce supply disruptions from the war in the Middle East. Brent crude futures were down 41 cents, or 0.5%, to $87.43 a barrel at 0330 GMT, **(Reuters)**

US crude oil inventories inch higher, gasoline down

US commercial oil inventories rose slightly during the week ending August 21, according to data released Wednesday by the US Energy Information Administration (EIA), while derivatives stockpiles moved down.This is the fourth successive rise in the US crude stockpile. However, it is below the US Petroleum Institute's estimates of a rise by 4.2 million barrels. **(Rueters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		25-Aug	26-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2352	2358	0.3%	6.3%	5.8%
Value	mn	6098	5707	-6.4%	15.1%	14.0%
Volume	mn	300	306	2.2%	19.7%	24.4%
NOMU						
Market Cap	mn	6975	7040	0.9%	-0.1%	-7.2%
Value	mn	51.9	25.9	-50.0%	25.0%	19.5%
Volume	mn	7.8	3.5	-54.8%	19.7%	46.9%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALASHGHAL ALMOYSRA	17.39	1.91	12%
ITMAM	14.62	1.28	10%
MOBI INDUSTRY	12.25	0.91	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
DRC	19.06	-2.8	-13%
ARABICA STAR	23.07	-2.43	-10%
DAR ALMARKABAH	0.94	-0.09	-9%

Source: Tadawul

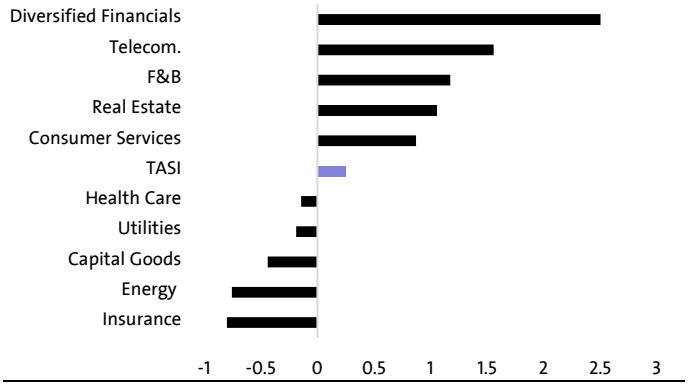
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ENAYA	11.17	1.01	10%
AMANA INSURANCE	8.09	0.73	10%
FIPCO	36.4	1.9	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
BAAN	2.1	-0.09	-4%
PETRO RABIGH	17.4	-0.64	-4%
MARAFIQ	43.24	-1.56	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
ALKATHIRI	1.27	0	0%	44.5
BAAN	2.1	-0.09	-4%	13.0
AMERICANA	2.37	0	0%	12.3
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	69	0.05	0%	647
ALINMA	25.9	0.48	2%	270
SAUDI ARAMCO	26.1	-0.18	-1%	190

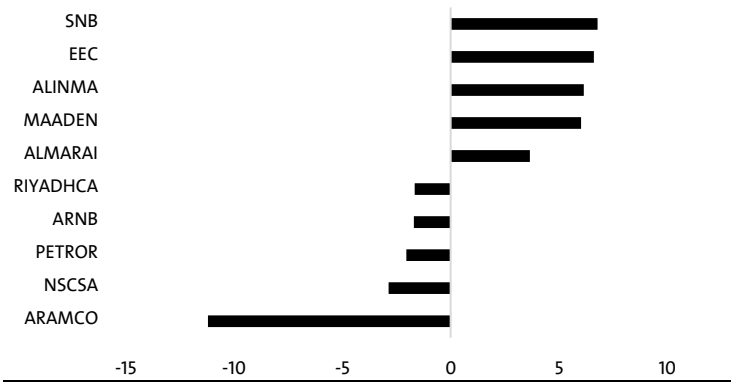
Source: Tadawul

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
27-Aug	NORTHERN CEMENT	Ex-dividend Date
27-Aug	SMASCO	Ex-dividend Date
30-Aug	ALBABTAIN	Ex-dividend Date
30-Aug	SAMA	Reports
01-Sep	AVALON PHARMA	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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