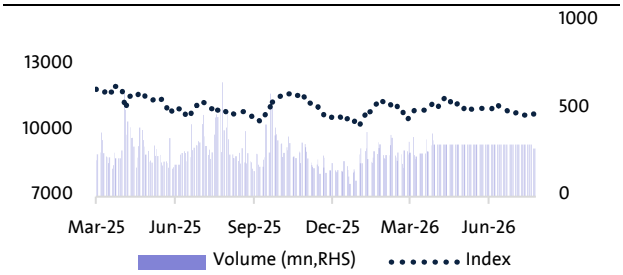
Daily Market Report

Key Indices-Return and Valuation

	28-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11238	-0.2%	6.1%	7%	14.7	1.5
NOMU	21798	-0.1%	-0.2%	-7%	0.0	1.5
S&P500	7712	-0.2%	3.0%	13%	21.1	5.7
Dow Jones	53560	0.0%	2.0%	11%	13.3	5.9
FTSE 100	10824	0.3%	-0.4%	9%	13.3	2.3
EuroStoxx50	6486	0.9%	2.0%	12%	16.4	2.5
Nikkei225	66406	0.4%	3.2%	32%	22.0	2.9
MSCI EM	1722	0.0%	3.4%	23%	11.6	2.5
SHCOMP	3952	-0.1%	3.1%	0%	14.0	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
27-Aug	143	115	12	1.2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	28-Aug	Δ bps	YTD Av	28-Aug	Δ bps	YTD Av
1M	4.71	8.6	5.6	3.69	0.1	4.3
3M	4.76	-3.9	5.4	3.76	-0.3	4.3
6M	5.31	-4.8	5.5	3.87	0.1	4.2
12M	5.06	1.4	5.2	4.02	0.7	4.0

Commodities

		28-Aug	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	85	1.7	135	60	-13.8
Brent	USDbbl	89	-0.4	118	59	-14.0
Gold	USDOz	4455	-3.1	5417	3448	-21.5
Silver	USDOz	66	-4.1	117	40	-39.9
Aluminum	USDton	3234	0.2	3851	2595	-16.5
Copper	USDton	14370	0.9	14336	9862	-20.0

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

Armah to debut on TASI at SAR 55/share today

Armah Sports Co. will list and start trading on the Main Market (TASI) today, Aug. 30, under the symbol (6022) in the consumer services sector with a daily price fluctuation limit of 10%. On Aug. 9, Tadawul approved Armah's application to transition from the Nomu-Parallel Market to TASI. **(Argaam)**

Derayah commits SAR 244M to AI, tech-focused fund

Derayah Financial Co. entered into a binding investment commitment of SAR 244 million ($65 million) in HOF Capital Strategic Opportunities Fund II (Cayman). The company said it paid 40% of the total commitment, or SAR 97.5 million ($26 million), upon closing on Aug. 28, 2026. The remaining 60% will be paid over the following 24 months, with the payment schedule and amounts subject to adjustment based on the fund's requirements. **(Argaam)**

2P awarded SAR 73.7M project with Jeddah Municipality

Perfect Presentation for Commercial Services Co. (2P) was awarded a tender for the operation and maintenance of cybersecurity devices and systems for Jeddah Municipality, at a total value of SAR 73.7 million, inclusive of VAT. **(Argaam)**

Al Majdiah, SOM partner to develop, design high-end projects

Dar Al Majed Real Estate Co. (Al Majdiah) signed a strategic cooperation agreement with global architecture and engineering firm Skidmore, Owings & Merrill (SOM) to develop and design high-end projects. **(Argaam)**

Knowledge Tower wins Maarif Education contract

Knowledge Tower Trading Co. won a contract from Maarif Education Co. on Aug. 27 to supply educational books and curricula for the 2026/2027 academic year. The total value of purchase orders for the 2026/2027 academic year has reached SAR 20.40 million to date. **(Argaam)**

Americana signs exclusive agreement to launch Taco Bell in UAE

Americana Restaurants International signed an exclusive development agreement with Taco Bell UK and Europe Limited, a subsidiary of Yum! Brands, to launch the Taco Bell brand in the UAE. The company said in a statement that the agreement extends its partnership with Yum! Brands, which includes operating KFC and Pizza Hut in several markets across the region. **(Argaam)**

Global

Warsh raises stakes for Fed's next meeting & other takeaways from Jackson Hole conference

Federal Reserve Chair Kevin Warsh renewed his inflation-fighting credentials in a speech Frida y that opened the door to potential rate hikes in the coming months. In doing so, Warsh has put more pressure on the central bank to increase interest rates when it next meets in mid-September if inflation doesn't improve. The government's next price report, to be released just days before the meeting, could play an outsize role in determining whether the central bank acts. **(AP)**

Commodities

Oil settles lower, posts weekly losses of over 5%

Oil prices fell at Friday's settlement, posting weekly losses as market participants assessed hawkish signals from the Federal Reserve, alongside hopes that diplomatic efforts could succeed in fully reopening the Strait of Hormuz. The latest round of the U.S.-Iran war entered its sixth month on Friday with no clear path toward a settlement, as U.S. President Donald Trump reiterated that he does not want to return to negotiations. **(Argaam)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		26-Aug	27-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2358	2354	-0.2%	6.1%	5.6%
Value	mn	5707	5075	-11.1%	2.9%	1.5%
Volume	mn	306	245	-20.1%	-3.1%	-0.5%
NOMU						
Market Cap	mn	7040	7032	-0.1%	-0.2%	-7.3%
Value	mn	25.9	17.0	-34.6%	-15.7%	-21.5%
Volume	mn	3.5	2.3	-36.0%	-20.9%	-5.6%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALFAKHERA	8.11	1.06	15%
DRC	20.99	1.93	10%
NBM	48.9	3.9	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
LIME INDUSTRIES	11	-1.42	-11%
RAWASI	3.5	-0.4	-10%
ALBATTAL FACTORY	10.59	-1.11	-9%

Source: Tadawul

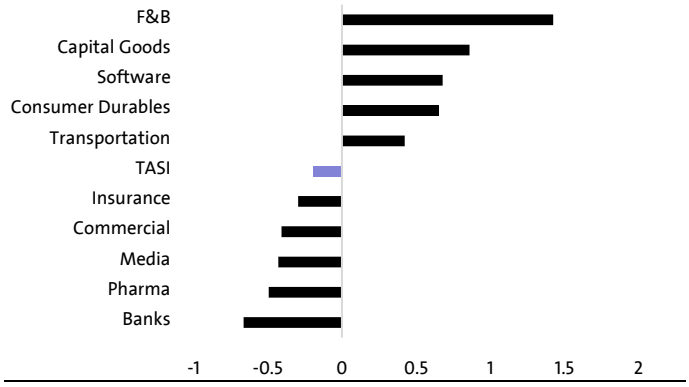
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	17.86	1.62	10%
ENAYA	11.79	0.62	6%
NICE ONE	12.69	0.65	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ALKATHIRI	1.22	-0.05	-4%
ACIG	8.43	-0.33	-4%
CHEMANOL	31.1	-0.9	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
ALKATHIRI	1.22	-0.05	-4%	13.7
AMERICANA	2.36	-0.01	0%	8.4
SAUDI ARAMCO	26.1	0	0%	8.2
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	68.3	-0.7	-1%	469
SAUDI ARAMCO	26.1	0	0%	215
ETIHAD ETISALAT	67.55	0.1	0%	181

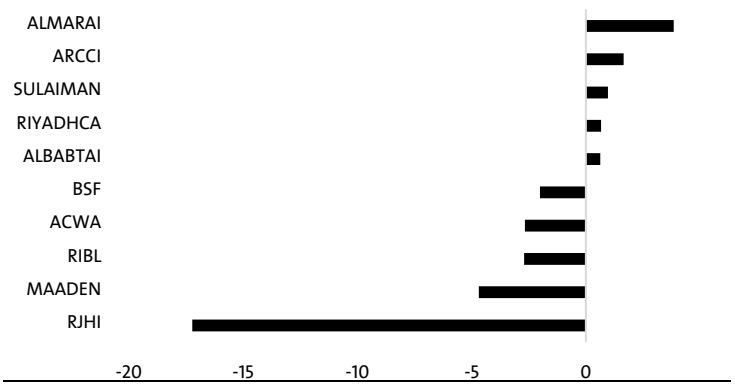
Source: Tadawul

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
30-Aug	ALBABTAIN	Ex-dividend Date
30-Aug	SAMA	Reports
01-Sep	AVALON PHARMA	Ex-dividend Date
02-Sep	GO TELECOM	Ex-dividend Date
03-Sep	MESC	Earnings call

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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Contact Us:

Alinma Capital Company
Research Department (Sell-Side)
Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh 55560
Saudi Arabia
Phone: 011-2185555 =86309
E-mail: research@alinmacapital.com

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