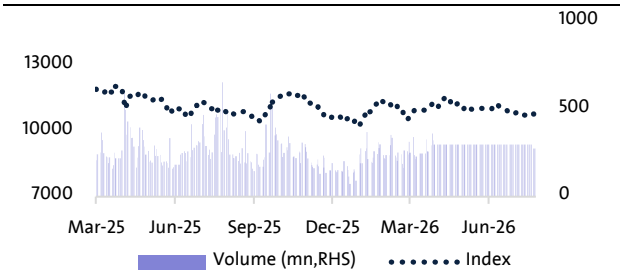
Daily Market Report

Key Indices-Return and Valuation

	30-Aug*	DoD	MTD	YTD	P/E	P/BV
TASI	11159	-0.7%	5.4%	6%	14.7	1.6
NOMU	21771	-0.1%	-0.3%	-7%	0.0	1.6
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
30-Aug	90	172	8	0.5:1

Money Market Yields

%	SAIBOR			Term SOFR		
	30-Aug	Δ bps	YTD Av	28-Aug	Δ bps	YTD Av
1M	4.71	-0.1	5.6	3.69	0.1	4.3
3M	4.76	-0.7	5.4	3.76	-0.3	4.3
6M	5.31	1.2	5.5	3.87	0.1	4.2
12M	5.06	4.9	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

SAMA assets fall to SAR 1.94T in July 2026

The Saudi Central Bank's (SAMA) assets declined to approximately SAR 1.94 trillion in July 2026, down SAR 27.8 billion from the previous month. According to SAMA's monthly statistical bulletin released today, the central bank's assets increased by approximately SAR 30.5 billion compared with July 2025. **(Argaam)**

Arabian Drilling signs SAR 3B contract for 11 land rigs

Arabian Drilling Co. signed a five-year contract with SLB Middle East to provide 11 land rigs for integrated gas drilling operations, with a total value of approximately SAR 3 billion. The relevant financial impact is expected to be reflected in the company's revenue starting from Q3 2026 and will support the continued operation of its land rig fleet throughout the contract period. **(Argaam)**

AMAK identifies 14M tons of mineralized material at Jabal Qaran

Almasane Alkobra Mining Co. (AMAK) announced the issuance of an independent Mineral Resource Estimate (MRE) report compliant with the JORC Code for its Jabal Qaran project in Najran. The report was prepared by Cube Consulting Pty Ltd. The independent estimate identified around 14 million tons of mineralized material at the Jabal Qaran project. The estimate includes 11.3 million tons of mineral resources classified under the JORC (2012) Code, in addition to around 2.7 million tons of unclassified mineralized material. **(Argaam)**

TAM board approves transition to TASI

TAM Development Co. stated that its board of directors approved, on Aug. 30, the company's transition from the Nomu-Parallel Market to the Main Market (TASI). **(Argaam)**

Dallah Health approves 20% capital increase via bonus shares

Dallah Healthcare Co. (Dallah Health) said its extraordinary general meeting (EGM) approved, the board of directors' recommendation to increase the company's share capital by 20% through a one-for-five bonus share distribution. **(Argaam)**

Global

Bessent pushes back on fears over US debt market strains

U.S. Treasury Secretary Scott Bessent brushed aside concerns about turbulence in the U.S. government bond market, arguing that worries about rising debt and yields overlook the strength of the U.S. economy and its fiscal outlook. In an interview with Reuters on Sunday, Bessent pushed back against mounting scrutiny of U.S. debt levels and criticism of the Treasury's efforts to manage market volatility, saying the market's performance contradicted claims of investor unease. **(Reuturs)**

Chinese factory slump eases, but weak services signal uneven recovery

China's factory activity improved in August on stronger demand but remained in contraction, while services activity stayed weak, underscoring deepening imbalances in the economy and fuelling calls for policy measures to boost the economy. **(Reuturs)**

Commodities

Oil jumps more than 2% after US attack on Iran's Larak island

Oil prices were trading more than 2% higher on Monday after the U.S. attacked an Iranian island in the Strait of Hormuz and drew retaliation from Tehran, as conflict in the Middle East extended into its sixth month. Brent crude futures climbed $2.51, or 2.85%, to $90.61 a barrel as of 0241 GMT while U.S. West Texas Intermediate crude was at $85.53, up $2.13, or 2.55%. **(Reuturs)**

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Daily Market Report

TASI & NOMU- Key Statistics

		27-Aug	30-Aug	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2354	2337	-0.2%	6.1%	5.6%
Value	mn	5075	112	-11.1%	2.9%	1.5%
Volume	mn	245	189	-20.1%	-3.1%	-0.5%
NOMU						
Market Cap	mn	7032	7023	-0.1%	-0.2%	-7.3%
Value	mn	17.0	0.1	-34.6%	-15.7%	-21.5%
Volume	mn	2.3	2.5	-36.0%	-20.9%	-5.6%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SMC	9.79	1.07	12%
PRO MEDEX	92	9	11%
HAWYIA	13	1.09	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MOLAN	0.88	-0.18	-17%
ALFAKHERA	7.41	-0.7	-9%
NBM	45.02	-3.88	-8%

Source: Tadawul

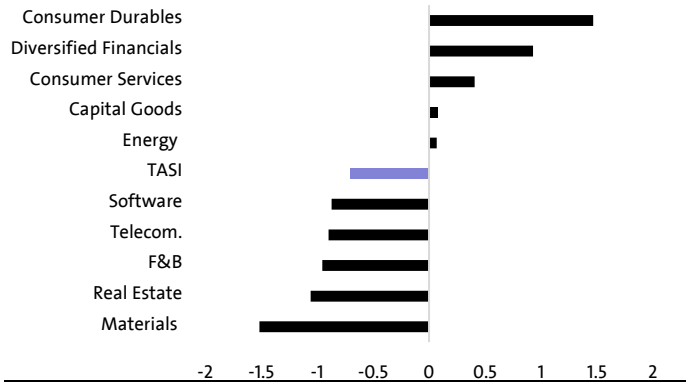
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ	19.64	1.78	10%
SFICO	72.8	6.6	10%
BAWAN	38.04	2.1	6%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NORTHERN CEMENT	6.79	-0.39	-5%
PETRO RABIGH	16.64	-0.71	-4%
TASNEE	9.11	-0.36	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.46	0.1	4%	17.3
MIAHONA	11.51	-0.07	-1%	7.1
PETRO RABIGH	16.64	-0.71	-4%	5.8
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	67.8	-0.5	-1%	352
SAUDI ARAMCO	26.14	0.04	0%	132
SFICO	72.8	6.6	10%	127

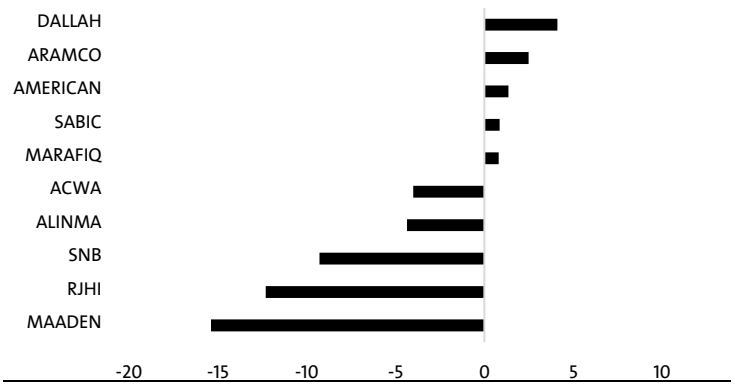
Source: Tadawul

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
01-Sep	AVALON PHARMA	Ex-dividend Date
02-Sep	GO TELECOM	Ex-dividend Date
03-Sep	MESC	Earnings call
03-Sep	TAWUNIYA	Ex-Bonus Day
06-Sep	YANSAB	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

Classification: Private

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