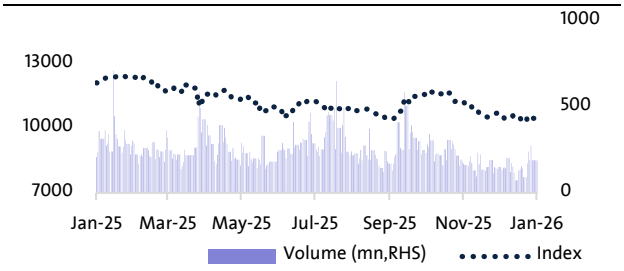
Daily Market Report

Key Indices-Return and Valuation

	13-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10802	-0.2%	-0.5%	2%	14.1	1.5
NOMU	22540	-0.1%	-1.6%	-4%	0.0	1.5
S&P500	7515	-0.8%	0.4%	10%	21.9	5.8
Dow Jones	52499	-0.3%	0.4%	9%	13.1	6.1
FTSE 100	10498	0.0%	0.2%	6%	13.1	2.3
EuroStoxx50	6271	0.0%	-0.2%	8%	16.1	2.5
Nikkei225	67243	-1.9%	-4.6%	34%	23.7	3.1
MSCI EM	1649	-2.4%	-4.2%	17%	12.2	2.5
SHCOMP	3914	-2.1%	-4.8%	-1%	13.9	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
13-Jul	129	128	13	1:1

Money Market Yields

%	SAIBOR			Term SOFR		
	13-Jul	Δ bps	YTD Av	13-Jul	Δ bps	YTD Av
1M	4.62	-11.2	5.6	3.68	0.5	4.3
3M	4.87	-3.2	5.4	3.76	1.5	4.3
6M	5.20	-9.9	5.5	3.89	3.4	4.2
12M	4.90	-1.7	5.2	4.05	5.4	4.0

Commodities

		13-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	83	3.4	135	60	-11.9
Brent	USDbbl	83	9.6	118	59	-11.0
Gold	USDOz	4026	-0.3	5502	3277	-14.8
Silver	USDOz	58	-3.7	117	37	-36.9
Aluminum	USDton	3168	1.0	3851	2553	-14.3
Copper	USDton	13503	0.4	14140	9594	-16.3

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 requests transfer to TASI

Armah Sports Co. submitted its application to transfer to the Main Market (TASI) on July 13 through the electronic system designated by the relevant regulatory authorities for this purpose. In November 2023, Armah offered its shares to the public and started trading on Nomu on Nov. 30. **(Argaam)**

Sign World receives SAR 30.8M purchase order from Finance Ministry

National Signage Industrial Co. (Sign World) received a purchase order worth SAR 30.8 million (VAT inclusive) from the Ministry of Finance, under the framework agreement for the supply of aluminum in various sizes for long and short vehicle plates. The company explained that the one-year contract, was signed today, July 13. It expects the related financial impact to be reflected in its results during the second half of 2026 and the first half of 2027. **(Argaam)**

Al Akaria says restrictions lifted on northern Riyadh land plot

Saudi Real Estate Co. (Al Akaria) said restrictions have been lifted on a 30,000-square-meter (sqm) land plot it owns in northern Riyadh after the Real Estate Registry issued a title registration deed. The plot, located in the Al Arid district within the commercial corridor between King Fahd Road and Olaya Road, has a book value of SAR 98.4 million. **(Argaam)**

GAC approves Tahweel's acquisition of Al-Rowad: Tasnee

National Industrialization Co. (Tasnee) announced the no-objection from the General Authority for Competition (GAC) for Tahweel Holding to fully acquire Al-Rowad Industrial Transformation Co. Tasnee signed on March 1 an agreement to sell its entire stake in Al-Rowad Industrial to Tahweel for SAR 700 million. **(Argaam)**

Global

US consumer inflation likely increased at a slow pace in June as gasoline prices retreated

U.S. consumer inflation likely slowed in June, but that would probably offer little comfort to households or rule out an interest rate increase from the Federal Reserve this year, with the conflict in the Middle East still unresolved. The anticipated moderation in the Consumer Price Index would largely reflect a retreat in gasoline prices from multi-year highs as a fragile ceasefire between the U.S. and Iran took hold last month. That truce, however, collapsed last week after commercial tankers came under fire in the Strait of Hormuz, triggering military strikes between the United States and Iran. **(Reuters)**

China's exports ride AI boom as domestic economy struggles

China's exports surged in June, buoyed by orders for chips and computing power to fuel the global AI boom, deepening producers' reliance on overseas buyers as policymakers in the world's No. 2 economy continue to grapple with how to boost demand at home. The stronger-than-expected trade performance keeps China on track to post a surplus topping $1 trillion for a second straight year, with factories sustaining sales despite slowing growth in major economies and trade frictions with Washington. **(Reuters)**

Commodities

Oil hits one-month high as US, Iran step up attacks in Strait of Hormuz

Oil prices rose nearly 3% on Tuesday to their highest in four weeks, as the U.S. reimposed its naval blockade of Iran while the two countries stepped up attacks in the Strait of Hormuz, heightening uncertainty about energy flows. Brent crude futures were last up $1.50, or 1.8%, to $84.80 per barrel at 0330 GMT, while U.S. West Texas Intermediate crude rose $1.70, or 2.2%, to $79.84 a barrel. **(Reuters)**

Please refer to page III for important disclosures

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics		12-Jul	13-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2266	2262	-0.2%	0.6%	1.5%
Value	mn	2208	4022	82.1%	2.6%	-21.3%
Volume	mn	126	199	57.9%	-5.7%	-20.0%
NOMU						
Market Cap	mn	7276	7271	-0.1%	-1.6%	-4.2%
Value	mn	12.0	12.6	5.3%	1.5%	-44.7%
Volume	mn	2.0	1.6	-22.5%	-23.8%	-34.2%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALASHGHAL ALMOYSRA	16.5	1.86	13%
MOBI INDUSTRY	10.75	1.05	11%
ALRAZI	33.96	2.46	8%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
NBM	45	-3.86	-8%
ALMUNEEF	5.07	-0.43	-8%
MSGA	6.12	-0.46	-7%

Source: Tadawul

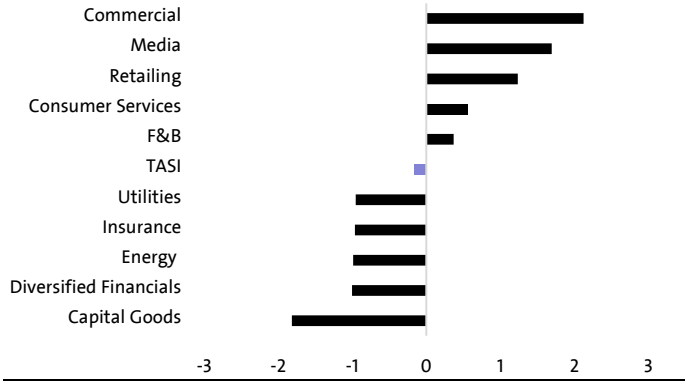
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALETIHAD	7.59	0.69	10%
ENTAJ	26.34	2.38	10%
TANMIAH	61.15	4.75	8%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
CMCER	5.51	-0.26	-5%
SIECO	2.34	-0.11	-4%
RASAN	135	-5	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.12	0.05	2%	21.2
PETRO RABIGH	14.5	0.68	5%	10.5
SIECO	2.34	-0.11	-4%	7.8
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	65.55	0.45	1%	304
RASAN	135	-5	-4%	182
SAUDI ARAMCO	26.5	-0.28	-1%	175

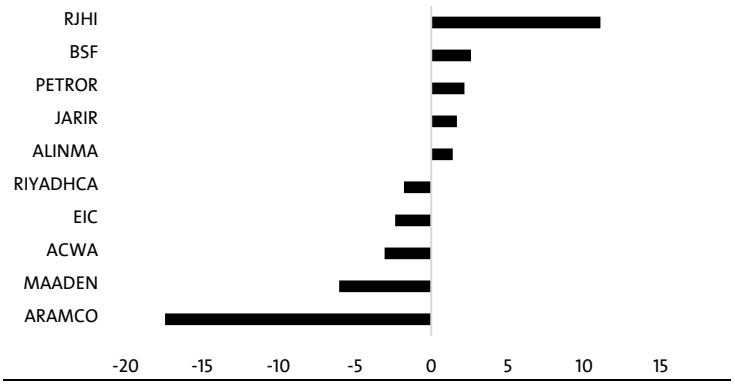
Source: Tadawul

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
14-Jul	CHEMANOL	Capital Reduction
15-Jul	ALMODAWAT	Ex-dividend Date
16-Jul	RAWASI	Ex-dividend Date
16-Jul	TECO	General Assembly
19-Jul	TAWUNIYA	Dividend payment

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
14-Jul	U.S.	Consumer Price Index	Jun	4.2%	3.8%
16-Jul	U.K.	(GDP) MoM	Jun	-0.1%	0.3%
17-Jul	E.U.	Consumer Price Index	Jun	3.0%	3.2%
24-Jul	U.S.	Purchasing Manager Index	Jun	55.7	55.1
24-Jul	U.S.	New home sales	Jun	638.0K	626.0K

Source: Bloomberg, Investing.Com

Classification: Private

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