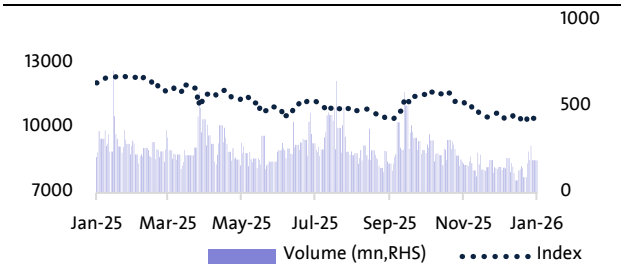
Daily Market Report

Key Indices-Return and Valuation

	14-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10716	-0.8%	-1.3%	2%	14.1	1.5
NOMU	22539	0.0%	-1.6%	-4%	0.0	1.5
S&P500	7544	0.4%	0.8%	10%	22.0	5.8
Dow Jones	52508	0.0%	0.4%	9%	13.1	6.1
FTSE 100	10529	0.3%	0.5%	6%	13.1	2.3
EuroStoxx50	6280	0.1%	0.0%	8%	16.1	2.5
Nikkei225	67744	0.7%	-3.9%	35%	23.8	3.1
MSCI EM	1653	0.2%	-4.0%	18%	11.9	2.5
SHCOMP	3967	1.4%	-3.5%	0%	14.1	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
14-Jul	73	184	13	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	14-Jul	Δ bps	YTD Av	14-Jul	Δ bps	YTD Av
1M	4.59	-14.4	5.6	3.68	1.7	4.3
3M	4.90	-1.0	5.4	3.75	1.2	4.3
6M	5.28	-1.4	5.5	3.87	1.2	4.2
12M	4.89	-2.4	5.2	4.03	1.3	4.0

Commodities

		14-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	92	10.0	135	60	-11.9
Brent	USDbbl	85	1.7	118	59	-11.0
Gold	USDOz	4029	-0.9	5502	3277	-14.8
Silver	USDOz	59	1.8	117	37	-36.9
Aluminum	USDton	3177	0.3	3851	2553	-14.3
Copper	USDton	13592	0.7	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

Saudi Arabia's new State Revenues Law to boost fiscal, debt governance: Minister

Minister of Finance Mohammed Al-Jadaan stressed that the newly-ratified State Revenues Law represents a significant step toward developing the governance of state revenues and enhancing their management efficiency in a way that supports fiscal sustainability. In a ministerial statement today, July 14, he pointed out that the law contributes to enabling government entities to improve revenue estimation mechanisms and raise compliance levels in paying dues. **(Argaam)**

25 contracting projects worth over SAR 29B awarded in June

The Saudi Contractors Authority (SCA) recently released its Contracting Sector Outlook-June 2026 report, aimed at providing contractors and investors with updates on key developments in sector projects. According to the report, 25 projects were awarded in June, with the combined value exceeding SAR 29 billion. The projects are scheduled to be implemented over five years, with completion expected between 2027 and 2031. **(Argaam)**

ProMedEx sets up JV to build SAR 35M medical plant

Professional Medical Expertise Co. (ProMedEx) entered into a joint venture (JV) agreement with Beijing Synapsor Artificial Intelligence Co. Ltd. to establish a limited liability company in Saudi Arabia under the name PMX Syai Arabia, or any other name approved by the relevant authorities. The JV was incorporated and registered in the commercial register on July 13, 2026. **(Argaam)**

ProMedEx sets up JV to build SAR 35M medical plant

Al Yamamah Steel Industries Company announces that its subsidiary, Al Yamamah for Reinforcing Steel Bars Company has signed a contract for the manufacturing, supply, and installation of steel billet production equipment with a specialized European company, with a contract value equivalent to SAR 270mn. **(Tadawul)**

EIC receives SAR 26.1M after court overturns competition fine

Electrical Industries Co. (EIC) said it received on July 14 the SAR 26.1 million fine from the General Authority for Competition (GAC), following the issuance of a final court ruling overturning the authority's fine imposed on two of its subsidiaries. **(Argaam)**

Global

ECB's Kocher sees currently no second-round effects from Iran war, but bank is ready to act

The European Central Bank currently sees no second-round effects from the U.S.-Israeli war on Iran, but is paying close attention to indirect price effects from the conflict, ECB policymaker Martin Kocher said in an interview published on Wednesday. **(Reuters)**

China's Q2 economic growth cools to 3-1/2-year low as imbalances worsen

China's economy expanded at its slowest pace in over three years in the second quarter, with weak household consumption clouding strong manufacturing and exports and intensifying concerns over the long-term sustainability of its unbalanced growth model. **(Argaam)**

Commodities

API says US crude inventories down 564,000 bbl

US commercial crude oil inventories fell during the week ended July 10, according to estimates released by the American Petroleum Institute (API).In its report issued Tuesday, the institute said crude inventories declined by 564,000 barrels last week.

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics		13-Jul	14-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2262	2244	-0.8%	-0.2%	0.7%
Value	mn	4022	4447	10.6%	11.0%	-13.0%
Volume	mn	199	259	29.7%	16.9%	3.5%
NOMU						
Market Cap	mn	7271	7271	0.0%	-1.6%	-4.2%
Value	mn	12.6	10.3	-18.5%	-14.4%	-54.7%
Volume	mn	1.6	1.9	21.2%	-8.3%	-20.2%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
RATIO	4.18	0.28	7%
SURE	37.4	2.4	7%
ALQEMAM	44.96	2.66	6%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MOLAN	1.06	-0.1	-9%
ALRAZI	31.2	-2.76	-8%
KEIR	1.23	-0.1	-8%

Source: Tadawul

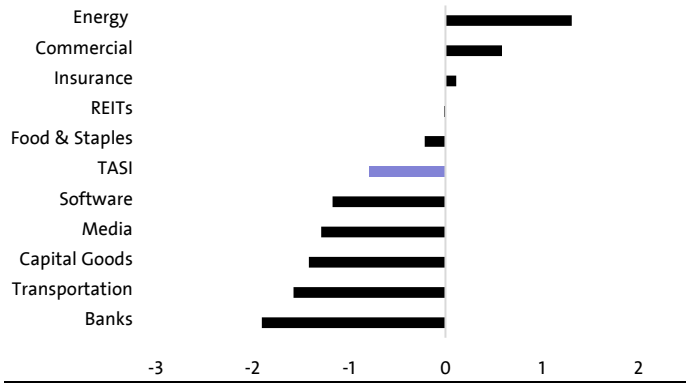
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
RED SEA	27.28	2.47	10%
ENTAJ	28.96	2.62	10%
ALAKARIA	17.07	1.33	8%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MBC GROUP	21.1	-0.96	-4%
BSF	19	-0.76	-4%
MASAR	17.1	-0.67	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.14	0.02	1%	31.6
SAUDI ARAMCO	26.86	0.36	1%	13.6
PETRO RABIGH	14.48	-0.02	0%	10.3
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	64.45	-1.1	-2%	365
SAUDI ARAMCO	26.86	0.36	1%	363
SNB	37.32	-0.94	-2%	159

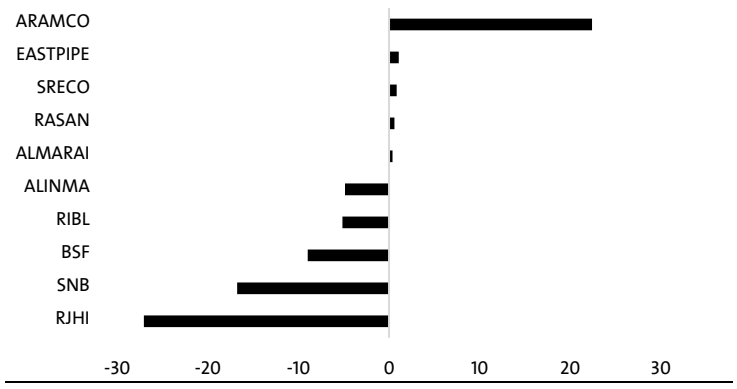
Source: Tadawul

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
15-Jul	ALMODAWAT	Ex-dividend Date
16-Jul	RAWASI	Ex-dividend Date
16-Jul	TECO	General Assembly
19-Jul	TAWUNIYA	Dividend payment
19-Jul	BUPA ARABIA	Dividend payment

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
28-Jul	U.S.	Consumer Confidence	Jun	94.4	90.6

Source: Bloomberg, Investing.Com

Classification: Private

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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