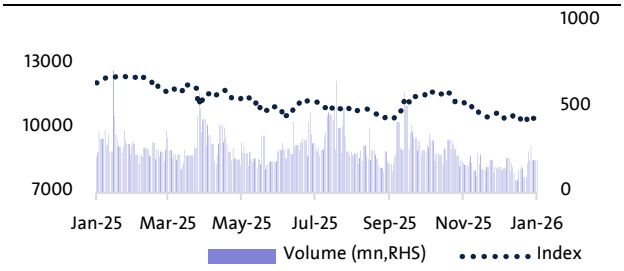
Daily Market Report

Key Indices-Return and Valuation

	19-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10717	0.0%	-1.3%	2%	13.9	1.5
NOMU	22156	-0.4%	-3.3%	-6%	0.0	1.5
S&P500	7458	0.0%	-0.3%	9%	21.6	5.7
Dow Jones	52146	0.0%	-0.3%	8%	13.2	6.0
FTSE 100	10600	0.0%	1.2%	7%	13.2	2.3
EuroStoxx50	6231	0.0%	-0.8%	8%	15.9	2.5
Nikkei225	64141	0.0%	-9.0%	27%	22.5	2.9
MSCI EM	1621	0.0%	-5.9%	15%	11.7	2.4
SHCOMP	3764	0.0%	-8.5%	-5%	13.4	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
19-Jul	65	190	15	0.3:1

Money Market Yields

%	SAIBOR			Term SOFR		
	19-Jul	Δ bps	YTD Av	17-Jul	Δ bps	YTD Av
1M	4.71	12.5	5.6	3.67	0.0	4.3
3M	4.82	-11.4	5.4	3.73	0.0	4.3
6M	5.05	-25.0	5.5	3.83	0.0	4.2
12M	4.90	-0.3	5.2	3.98	0.0	4.0

Commodities

		20-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	91	2.9	135	60	-12.2
Brent	USDbbl	91	3.3	118	59	-11.3
Gold	USDOz	4359	0.5	5502	3277	-14.8
Silver	USDOz	57	1.2	117	37	-37.3
Aluminum	USDton	3158	0.0	3851	2553	-14.6
Copper	USDton	13415	0.0	14140	9594	-16.9

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 climbs to 13th globally in FDI inflows

Saudi Arabia climbed to 13th place among the world's largest recipients of foreign direct investment (FDI) in 2025, up from 17th in 2024, according to the latest World Investment Report issued by the United Nations Conference on Trade and Development (UNCTAD).The report showed that net FDI inflows into the Kingdom reached $32.6 billion in 2025, compared with $21.3 billion in 2024, marking a year-on-year increase of nearly 53%. Saudi Arabia's total inward FDI stock also rose to $293.3 billion, reflecting continued investor confidence and the growing attractiveness of the Kingdom's strategic sectors. **(Zawya)**

Knowledge City sells 3 plots for SAR 398.8M, expects SAR 360.8M profit

Knowledge Economic City (KEC) signed two agreements on July 16 to sell three land plots located within the Knowledge Economic City project in Madinah, for a total net value of SAR 398.8 million, excluding real estate transaction tax, sale registration fees, and any other government fees. **(Argaam)**

Public investment funds assets rise 20% to SAR 231.7B in Q1 2026

Assets of public investment funds in Saudi Arabia rose to SAR 231.7 billion in Q1 2026, an increase of 20% from SAR 193 billion in Q1 2025, data from the Saudi Central Bank (SAMA) showed. **(Argaam)**

Foreign institutions net buyers of SAR 109.3M on TASI last week

Foreign institutions on the Main Market (TASI) were net buyers of stocks worth SAR 109.3 million during the week ended July 16. According to Saudi Exchange data, foreign institutions accounted for 39.74% of total purchases and 39.13% of total sales during the week. **(Argaam)**

Lumi detects limited unauthorized access to certain customer data

Lumi Rental Co. detected an incident involving limited unauthorized access to certain customer data through one of its systems. The company immediately activated its approved security procedures and protocols, implemented the necessary technical measures to contain the incident and secure the affected access point, it said in a statement to Tadawul. **(Argaam)**

Global

China securities regulator to hold market stability meeting, state media reports

China's securities watchdog will meet market participants on Monday to discuss market stability, official media said, as state-backed investors bought shares in an effort to stem a rapid slide in prices. The move follows a rout that wiped out 10 trillion yuan ($1.48 trillion) worth of China market capitalisation over the past two weeks. Two state-owned firms said over the weekend they had deployed roughly 60 billion yuan to buy stocks. **(Reuters)**

China securities regulator to hold market stability meeting, state media reports

China's exports of fuel oil, mainly for marine fuel bunkering, climbed 55% month-on-month in June, customs data showed on Monday, reaching the highest in 2026 so far. **(Reuters)**

Commodities

Oil jumps 3% as US, Iran expand strikes in the Middle East

Oil prices jumped about 3% on Monday, with Brent oil prices surpassing $90 per barrel, as escalating U.S.-Iran hostilities in the Middle East restricted oil shipments through the Strait of Hormuz. Brent crude futures climbed $2.77, or 3.14%, to $90.87 by 0612 GMT, touching the highest since June 11, extending gains after rising 15.9% last week, its biggest weekly gain since April. **(Reuters)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics		16-Jul	19-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2245	2245	0.3	-0.2%	0.7%
Value	mn	3352	3419	2.0%	-10.8%	-32.5%
Volume	mn	163	130	-20.0%	-34.8%	-47.2%
NOMU						
Market Cap	mn	7285	7174	-1.5%	-2.9%	-5.4%
Value	mn	8.4	15.0	78.2%	21.2%	-33.8%
Volume	mn	1.4	2.1	53.4%	4.4%	-10.1%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
RIMATH	30.58	2.18	8%
TAM DEVELOPMENT	81.7	5.8	8%
TAQAT	8.8	0.42	5%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
AICTEC	1.23	-0.14	-10%
KNOWLEDGE TOWER	6.23	-0.59	-9%
ALKUZAMA	55	-5	-8%

Source: Tadawul

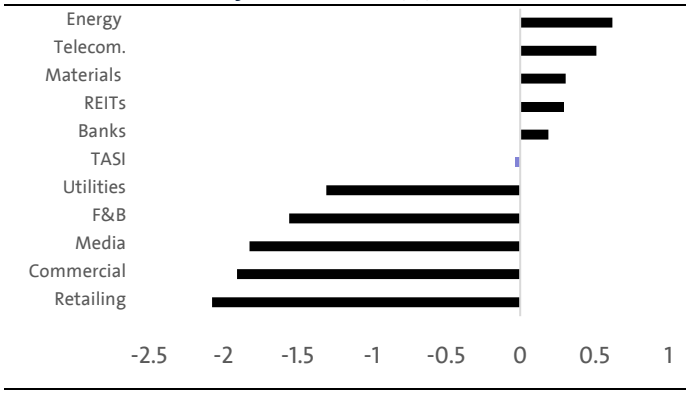
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
KEC	13.21	1.2	10%
ENAYA	9.3	0.6	7%
AMAK	71.35	3.35	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
RASAN	134	-5	-4%
SMASCO	6.23	-0.22	-3%
THIMAR	34.2	-1.16	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
PETRO RABIGH	15	0.44	3%	13.9
AMERICANA	2.1	-0.03	-1%	10.4
SAUDI ARAMCO	26.84	0.16	1%	4.7
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
PETRO RABIGH	15	0.44	3%	209
ALRAJHI	64.75	0.3	0%	151
SAUDI ARAMCO	26.84	0.16	1%	126

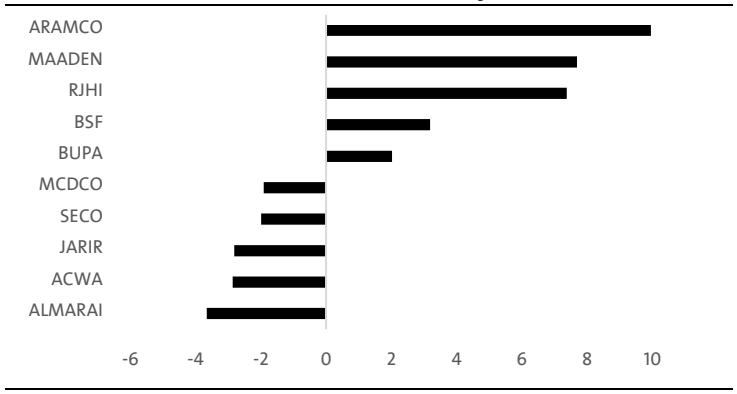
Source: Tadawul

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
21-Jul	ZAIN KSA	Dividend payment
22-Jul	NASEEJ	Ex-dividend Date
23-Jul	SAUDI GERMAN HEALTH	Dividend payment
26-Jul	DERAYAH REIT	Ex-dividend Date
28-Jul	ALISTITHMAR REIT	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
30-Jul	U.K.	Interest Rate Decision	Jun	3.75%	3.75%
31-Jul	C.N.	Manufacturing PMI	Jun	50.1	50.0

Source: Bloomberg, Investing.Com

Classification: Private

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