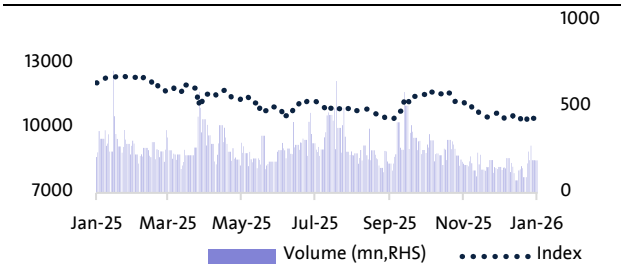
Daily Market Report

Key Indices-Return and Valuation

	20-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10742	0.2%	-1.1%	2%	14.0	1.5
NOMU	22142	-0.1%	-3.4%	-6%	0.0	1.5
S&P500	7443	-0.2%	-0.5%	9%	21.6	5.7
Dow Jones	51839	-0.6%	-0.9%	8%	13.1	6.0
FTSE 100	10525	-0.7%	0.4%	6%	13.1	2.3
EuroStoxx50	6227	-0.1%	-0.9%	8%	15.9	2.5
Nikkei225	64141	0.0%	-9.0%	27%	22.5	2.9
MSCI EM	1617	-0.2%	-6.1%	15%	11.6	2.4
SHCOMP	3796	0.9%	-7.7%	-4%	13.6	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
20-Jul	78	179	13	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	20-Jul	Δ bps	YTD Av	20-Jul	Δ bps	YTD Av
1M	4.61	-10.7	5.6	3.67	0.0	4.3
3M	4.75	-7.0	5.4	3.73	0.0	4.3
6M	5.09	3.8	5.5	3.83	0.0	4.2
12M	4.96	6.0	5.2	3.98	0.0	4.0

Commodities

		20-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	89	1.2	135	60	-12.2
Brent	USDbbl	89	1.3	118	59	-11.3
Gold	USDOz	4059	1.0	5502	3277	-14.8
Silver	USDOz	56	0.9	117	37	-37.3
Aluminum	USDton	3147	-0.4	3851	2553	-14.6
Copper	USDton	13616	1.5	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 real estate prices rise 1.3% in Q2 2026

Saudi Arabia's real estate price index rose 1.3% year-on-year (YoY) in Q2 2026 to 106.3 points, compared with 105.0 points in Q2 2025, based on 2023 as the base year, data issued by the General Authority for Statistics showed The increase was mainly driven by a 2.6% rise in residential property prices, which carry the largest weight in the index at 72.7%. **(GASTAT)**

TAWAL in talks to buy over 10,000 Mobily towers

TAWAL Co., a telecommunications tower company, is in talks to acquire more than 10,000 tower sites from Etihad Etisalat Co. (Mobily). The deal could be announced later this year if negotiations make progress, the sources added. Following completion of the transaction, Tawal is expected to begin preparing for a potential IPO in 2027 or 2028. **(Semfor)**

Signworld gets SAR 18.5M PO for giant screen in Dammam

National Signage Industrial Co. (Signworld) received a SAR 18.5 million purchase order (PO) from Faden Advertising Agency Co. to supply and install a giant digital screen on the facade of a building in Dammam, including VAT. The company expects the contract to have a financial impact starting from the second half of 2026. **(Argaam)**

Saudi Azm wins HRSD platform development project

Saudi Azm for Communication and Information Technology Co. secured a project from the Ministry of Human Resources and Social Development (HRSD), with a value exceeding 5% of the company's 2025 revenue. The project involves developing the ministry's social support and subsidy programs platform. **(Argaam)**

SRMG unit signs 3-year sponsorship, advertising services agreement with stc

Saudi Research and Media Group (SRMG) announced that its subsidiary, SRMG Media Solutions (SMS), signed a sponsorship and advertising services agreement with stc, acting as the media representative of Thmanyah Publishing and Distribution, the exclusive broadcaster of the Saudi Pro League. The value of the three-year contract exceeds 5% of SRMG's total revenue based on its latest audited annual financial statements for 2025. **(Argaam)**

Global

UK borrows less in June but fiscal challenge for Burnham remains huge

Britain's government borrowed £16 billion ($21.51 billion) in June, a third less than in the same month last year, according to official data which nonetheless showed the scale of the fiscal challenge facing new Prime Minister Andy Burnham. A Reuters poll of economists included a median forecast of a deficit of £18 billion for the last full month before Burnham replaced Keir Starmer as prime minister. **(Reuters)**

European banks set for profit boost from lending, trading windfall

After a surge in revenue at U.S. banks, European lenders are expected to follow suit this week when they report second-quarter earnings, powered by gains from higher interest rates and in some cases from trading and investment banking. **(Reuters)**

Commodities

Oil prices dip as mediation efforts offset US-Iran strikes

Oil prices softened on Tuesday, with markets weighing reports of mediation efforts between the U.S. and Iran against an exchange of fresh attacks between the two and threats of a naval blockade of Saudi Arabia by Yemen's Houthis. Brent crude futures eased 35 cents, or 0.4%, to $88.87 per barrel by 0052 GMT, while U.S. West Texas Intermediate crude for September delivery was steady at $82.47 a barrel. Both contracts were trading below their highest levels in more than a month hit in the previous session. **(Reuters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics		19-Jul	20-Jul	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2245	2250	0.2%	0.0%	0.9%
Value	mn	2380	3958	66.3%	3.8%	-21.7%
Volume	mn	130	237	82.0%	13.2%	-4.1%
NOMU						
Market Cap	mn	7148	7143	-0.1%	-3.4%	-5.9%
Value	mn	13.6	10.1	-25.7%	-15.5%	-54.9%
Volume	mn	1.8	1.8	-1.1%	-11.5%	-25.7%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ITMAM	14.85	1.5	11%
ALQEMAM	47.5	4.3	10%
AQASEEM	3.38	0.27	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MEYAR	27.7	-2.3	-8%
OSOOL AND BAKHEET	11	-0.89	-7%
TAM DEVELOPMENT	76	-5.7	-7%

Source: Tadawul

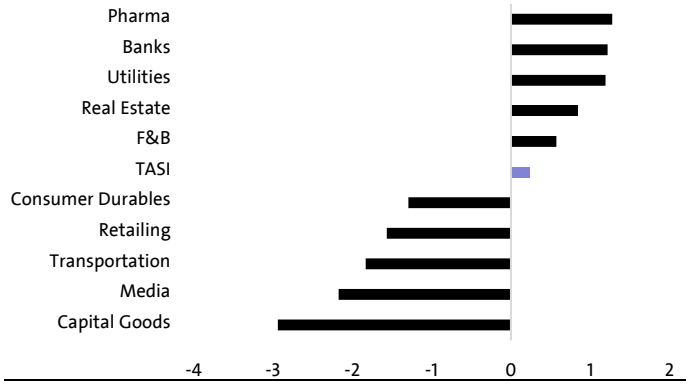
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MASAR	17.94	0.89	5%
KEC	13.84	0.63	5%
ANB	21.71	0.88	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
SAL	164.4	-9.4	-5%
TECO	15.33	-0.84	-5%
BAWAN	36.1	-1.88	-5%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI DARB	2.18	0.07	3%	41.9
PETRO RABIGH	14.7	-0.3	-2%	18.9
AMERICANA	2.09	-0.01	0%	14.3
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

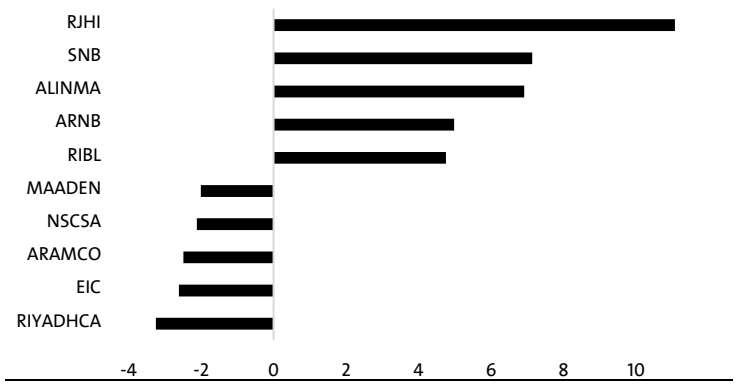
Source: Tadawul

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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