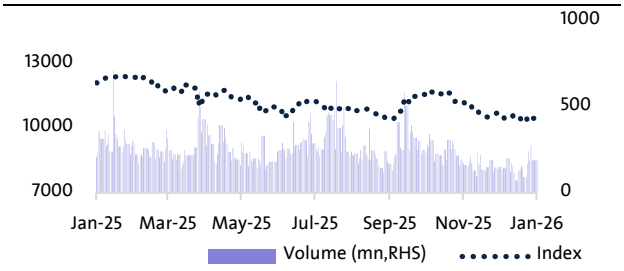
Daily Market Report

Key Indices-Return and Valuation

	26-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10767	-0.3%	-0.8%	2%	14.1	1.5
NOMU	22002	-0.3%	-4.0%	-6%	0.0	1.5
S&P500	7412	0.0%	-1.0%	8%	21.1	5.6
Dow Jones	51947	0.5%	-0.7%	8%	13.4	6.0
FTSE 100	10736	0.9%	2.5%	8%	13.4	2.3
EuroStoxx50	6281	1.1%	0.0%	8%	16.0	2.5
Nikkei225	64611	-2.7%	-8.3%	28%	22.7	3.0
MSCI EM	1628	-2.6%	-5.5%	16%	12.0	2.5
SHCOMP	3814	-1.6%	-7.3%	-4%	13.7	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
26-Jul	98	158	14	0.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	26-Jul	Δ bps	YTD Av	24-Jul	Δ bps	YTD Av
1M	4.56	0.3	5.6	3.72	3.1	4.3
3M	4.78	6.5	5.4	3.81	3.5	4.3
6M	5.03	-18.5	5.5	3.95	4.3	4.2
12M	4.94	-0.1	5.2	4.12	5.0	4.0

Commodities

		24-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	95	-6.6	135	60	-12.6
Brent	USDbbl	97	-3.9	118	59	-11.8
Gold	USDOz	4053	0.1	5417	3275	-19.8
Silver	USDOz	58	1.0	117	37	-37.6
Aluminum	USDton	3171	-1.1	3851	2553	-14.8
Copper	USDton	13617	-0.9	14140	9594	-17.3

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 oil exports climb 19% to SAR 70.9B in May

Saudi Arabia's petroleum exports reached nearly SAR 70.9 billion in May 2026, marking a 19.5% year-on-year (YoY) increase. Compared to April 2026, petroleum exports increased by SAR 1.54 billion, or 2.2%. Petroleum exports accounted for 75.6% of the Kingdom's total merchandise exports of SAR 93.8 billion in May. **(Argaam)**

CHUBB Arabia settles Al Rasheed's fire claim for SAR 42M

Chubb Arabia Cooperative Insurance Co. announced today, July 26, that it reached an agreement with Mohammed Hadi Al Rasheed and Partners Co. to settle the insurance claim related to a fire at the group's factory in Dammam's third Industrial City in July 2025 for a total net amount of SAR 42.01 million. The insurer said the loss was adequately covered under its existing reinsurance arrangement, adding that the related provision was recognized in the 2025 financial year. **(Argaam)**

LIVA signs insurance services contract with BSF

LIVA Insurance Co. said it bagged a contract to offer group life insurance services from Banque Saudi Fransi (BSF). The insurer said the value of the one-year contract exceeds 10% of its total insurance revenue, based on the audited 2025 financial statements. LIVA expects the contract to have a financial impact on its 2026 results. **(Argaam)**

Sport Clubs inks SAR 22.8M land lease for 2 Khamis Mushayt gyms

Sport Clubs Co. signed a SAR 22.75 million (excluding VAT) land lease agreement with the Municipality of Khamis Mushayt Governorate. the company said the agreement covers the investment, development, and fit-out of a 5,550.68-square-meter plot in the Al Bawadi district on Prince Sultan Road in Khamis Mushayt. **(Argaam)**

Al-Jouf Agricultural signs Almunajem deal, approves SAR 345M capital hike

Al-Jouf Agricultural Development Co. signed a binding subscription agreement with Almunajem Foods Co. Under the agreement, the company will increase its capital to SAR 345 million from SAR 300 million. The increase will be carried out through a private placement with preemptive rights suspended, involving the issuance of 4.5 million new ordinary shares. **(Argaam)**

Global

China's industrial profit growth moderates as exports cushion uneven recovery

Profits at China's industrial firms grew at a solid, though slower, pace as resilient exports helped cushion sluggish domestic demand, highlighting the economy's uneven recovery despite policymakers' efforts to spur consumption. **(Reuters)**

Emerging markets stare at inflation risks as powerful El Niño looms

Emerging economies already strained by the Middle East conflict face a new threat: a potentially powerful El Niño that could push up food prices and slow growth. The U.S. National Oceanic and Atmospheric Administration is forecasting an 81% chance of a very strong El Niño through October-December period, potentially placing it among the most powerful events on record since 1950 and dubbed by markets as "super El Niño". **(Reuters)**

Commodities

Oil drops 5% amid hopes of de-escalation in Middle East

Oil prices fell sharply today, July 27, following a halt in the tit-for-tat military strikes between the US and Iran after two weeks of escalating confrontations, boosting market hopes for a diplomatic solution to the crisis. ING analysts said in a note to clients that oil prices dropped in early trading as both sides refrained from new attacks, providing the first tangible signs of a possible de-escalation. **(Reuters)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics						
		23-Jul	26-Jul	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2257	2263	0.3%	0.6%	1.5%
Value	mn	3777	4045	7.1%	4.7%	-19.7%
Volume	mn	167	173	3.6%	-13.9%	-29.7%
NOMU						
Market Cap	mn	7107	7121	0.2%	-3.7%	-6.1%
Value	mn	6.6	5.3	-19.5%	-51.4%	-75.8%
Volume	mn	1.3	0.9	-25.0%	-48.6%	-59.7%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALRAZI	32.6	2.92	10%
OSOOL AND BAKHEET	12	1	9%
MSGA	6.18	0.51	9%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
RIMATH	28.6	-2.84	-9%
ARABICA STAR	26.02	-2.42	-9%
WSM	17.01	-1.47	-8%

Source: Tadawul

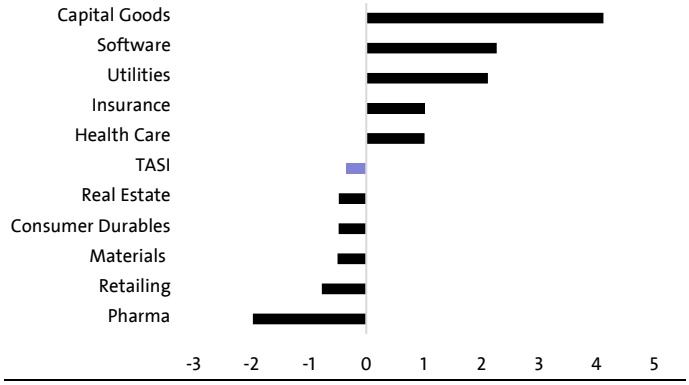
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
EIC	14.83	1.34	10%
CARE	115	6	6%
ATAA	47.2	2.42	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
RAOOM	75.5	-3.5	-4%
DAR ALARKAN	19.2	-0.65	-3%
JAMJOOM PHARMA	142.4	-4.2	-3%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
SAUDI ARAMCO	26.76	0.26	1%	14.9
EIC	14.83	1.34	10%	12.0
PETRO RABIGH	15.08	0.52	4%	10.9
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.76	0.26	1%	397
ALRAJHI	63.95	-0.3	0%	341
SNB	39.56	-0.34	-1%	196

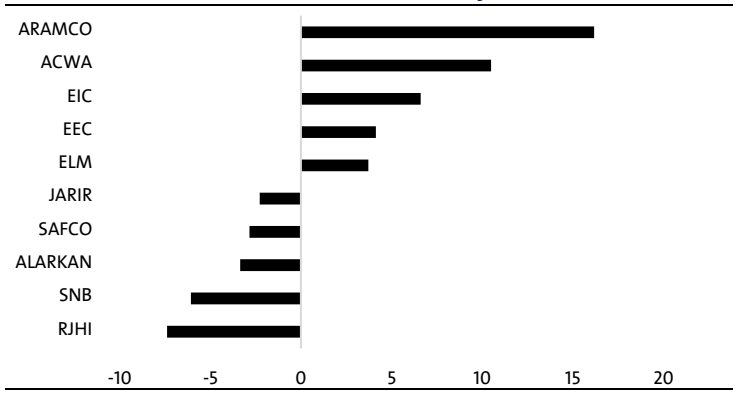
Source: Tadawul

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
28-Jul	ALISTITHMAR REIT	Ex-dividend Date
30-Jul	ETIHAD ETISALAT (Mobily)	Ex-dividend Date
30-Jul	KINGDOM	Ex-dividend Date
30-Jul	ALBILAD	Ex-dividend Date
30-Jul	JAMJOOM PHARMA	Ex-dividend Date

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
31-Jul	E.U.	Consumer Price Index	Jun	2.8%	3.2%
04-Aug	U.S.	JOLTS Job Openings	Jun	7.280M	7.585M

Source: Bloomberg, Investing.Com

Classification: Private

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