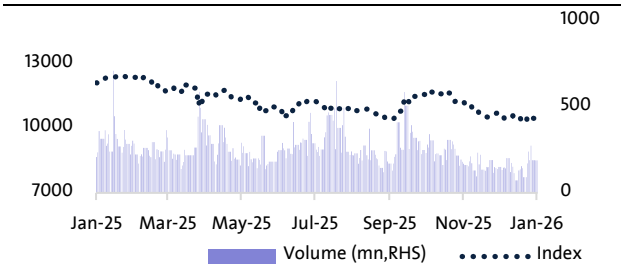
Daily Market Report

Key Indices-Return and Valuation

	27-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10769	0.0%	-0.8%	2%	14.1	1.5
NOMU	21962	-0.2%	-4.1%	-7%	0.0	1.5
S&P500	7413	0.0%	-0.9%	8%	21.1	5.6
Dow Jones	52210	0.5%	-0.2%	9%	13.5	6.0
FTSE 100	10782	0.4%	2.9%	9%	13.5	2.4
EuroStoxx50	6282	0.0%	0.0%	8%	16.0	2.5
Nikkei225	64931	0.5%	-7.9%	29%	22.7	2.9
MSCI EM	1643	0.9%	-4.6%	17%	11.6	2.4
SHCOMP	3858	1.2%	-6.2%	-3%	13.8	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
27-Jul	120	136	14	0.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	27-Jul	Δ bps	YTD Av	27-Jul	Δ bps	YTD Av
1M	4.64	8.3	5.6	3.72	3.1	4.3
3M	4.82	3.9	5.4	3.81	3.5	4.3
6M	4.99	-4.5	5.5	3.95	4.3	4.2
12M	4.96	2.3	5.2	4.12	5.0	4.0

Commodities

		27-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	89	-5.5	135	60	-12.7
Brent	USDbbl	88	-8.7	118	59	-11.9
Gold	USDOz	4076	0.6	5417	3275	-19.9
Silver	USDOz	58	0.3	117	37	-37.7
Aluminum	USDton	3182	0.4	3851	2553	-14.9
Copper	USDton	13771	1.1	14140	9594	-17.4

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 trade surplus soars 329% to SAR 26B in May

Saudi Arabia's trade balance recorded a surplus of SAR 26.02 billion in May 2026, jumping 329% year-on-year (YoY), marking the highest growth rate since November 2021. Trade balance rose 14% month-on-month (MoM). Meanwhile, the Kingdom's total merchandise exports rose 4% YoY to SAR 93.8 billion in May, while imports decreased by 20% YoY to SAR 67.8 billion. **(Argaam)**

Mobily in preliminary talks with TAWAL for telecom tower buyout

Etihad Etisalat Co. (Mobily) said that, in response to media reports and social media posts published on July 20, regarding ongoing talks with TAWAL over the potential sale of its telecommunications towers, the two parties have held preliminary discussions on the matter. **(Argaam)**

ARDARA, Sumou Holding launch 2nd investment in Al Wadi Project

ARDARA, in partnership with Sumou Holding, launched the second investment in the Al Wadi project in Abha, with an investment exceeding SAR 4 billion. The step came under the patronage of Prince Turki bin Talal bin Abdulaziz, Governor of the Asir Region. **(Argaam)**

solutions signs SAR 159.7M contract with stc

Arabian Internet and Communications Services Co. (solutions) signed a SAR 159.7 million contract with stc on July 27 to renew AI software & digital solutions licenses, ensuring system continuity. According to a statement to Tadawul, the financial impact of the three-year contract is expected to appear starting in Q3 2026. **(Argaam)**

RCRC completes preliminary northeast Riyadh master plan

The Royal Commission for Riyadh City (RCRC) completed the preliminary master plan for a 456-square-kilometer (sq km) area northeast of Riyadh, near King Khalid International Airport, Wadi Al Sulay and the Dammam and Al Janadriyah roads. **(Argaam)**

Petro Rabigh aims to raise production capacity to 400,000 bpd: CEO

Rabigh Refining and Petrochemical Co. (Petro Rabigh) is considering increasing its production capacity to more than 400,000 barrels per day (bpd), CEO and President Othman Al-Ghamdi said. The planned expansion aligns with the Kingdom's ongoing energy infrastructure development and the increased capacity of the East-West Pipeline. **(Argaam)**

Global

Growing number of brokerages see July Fed decision as 'a close call'

A growing number of major brokerages believe there is a real risk of the Federal Reserve delivering a rate hike at its meeting this week, given this month's surge in oil prices and the escalation in tensions in the Middle East. **(Reuters)**

Bank of Japan to signal more rate hikes as price pressures build

The Bank of Japan is set to keep interest rates steady on Friday but leave scope for further hikes with hawkish communication, as the economy faces mounting inflationary pressure from the Middle East war, a weak yen and robust global AI demand. **(Reuters)**

Commodities

Oil prices extend decline as US and Iran pause attacks

Oil prices extended declines on Tuesday, down by over $1 per barrel amid hopes for a resolution in the U.S.-Iran war which significantly disrupted global energy flows. Brent crude futures were down $1.47, or 1.66%, at $86.89 by 0326 GMT. **(Reuters)**

Classification: Private

Daily Market Report

TASI & NOMU- Key Statistics						
		26-Jul	27-Jul	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2255	2255	0.0%	0.3%	1.2%
Value	mn	2379	4447	86.9%	15.8%	-11.4%
Volume	mn	119	209	75.0%	5.2%	-14.6%
NOMU						
Market Cap	mn	7098	7085	-0.2%	-4.1%	-6.6%
Value	mn	14.4	9.3	-35.5%	-17.3%	-57.6%
Volume	mn	1.9	1.2	-37.3%	-33.0%	-47.5%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
YAQEEN	9.55	0.47	5%
SAHAT ALMAJD	5.97	0.27	5%
ADEER	96.95	3.95	4%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
MUFEED	31.72	-3.28	-9%
DAR ALMARKABAH	1.09	-0.09	-8%
ALRAZI	27.5	-1.56	-5%

Source: Tadawul

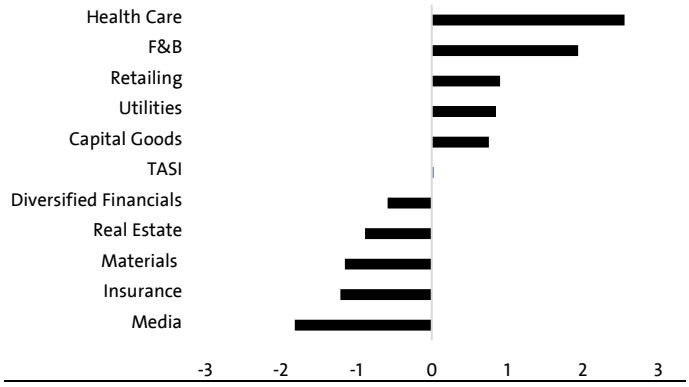
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TADCO	8.14	0.74	10%
DBS	10.85	0.61	6%
MARAFIQ	38.72	1.92	5%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
ACC	22.11	-1.38	-6%
ARABIAN DRILLING	86.45	-3.55	-4%
ALRAJHI TAKAFUL	50.65	-1.95	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
PETRO RABIGH	15.92	0.64	4%	39.0
AMERICANA	2.1	-0.01	0%	11.9
SAUDI ARAMCO	26.56	-0.04	0%	8.2
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
PETRO RABIGH	15.92	0.64	4%	618
ALRAJHI	64.3	-0.2	0%	308
SAUDI ARAMCO	26.56	-0.04	0%	217

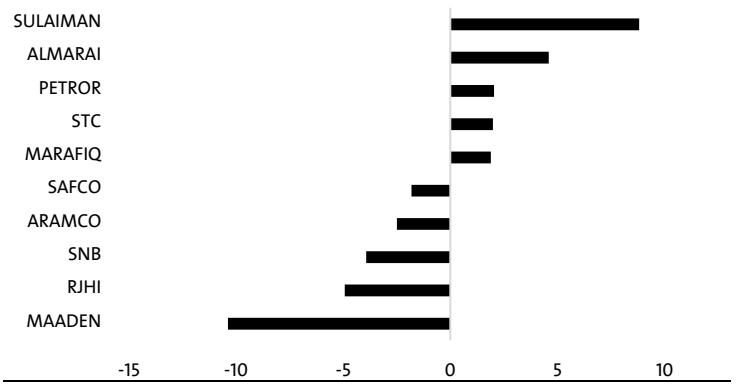
Source: Tadawul

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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