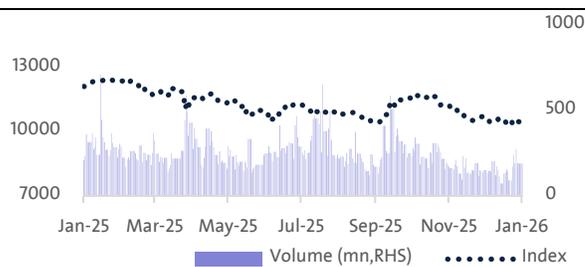


Daily Market Report

Key Indices-Return and Valuation

	08-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	11217	0.25%	-1.5%	6%	17.6	1.6
NOMU	23887	0.09%	-0.1%	2%	0.0	1.6
S&P500	6932	0.00%	-0.1%	1%	25.0	5.4
Dow Jones	50116	0.00%	2.5%	4%	15.4	5.8
FTSE 100	10370	0.00%	1.4%	4%	15.4	2.4
EuroStoxx50	5998	0.00%	0.9%	4%	18.0	2.5
Nikkei225	54254	0.00%	1.7%	8%	22.3	2.7
MSCI EM	1506	0.00%	-1.4%	7%	16.7	2.3
SHCOMP	4066	0.00%	-1.3%	2%	15.6	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
08-Feb	159	100	8	1.6:1

Money Market Yields

%	SAIBOR			Term SOFR		
	08-Feb	Δ bps	YTD Av	06-Feb	Δ bps	YTD Av
1M	4.73	1.4	5.6	3.67	-0.5	4.3
3M	4.81	-10.7	5.4	3.66	-0.6	4.3
6M	5.13	-9.3	5.5	3.62	-0.8	4.2
12M	4.80	-4.6	5.2	3.50	-0.9	4.0

Commodities

	Unit	06-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	67	-2.1	80	60	2.5
Brent	USDbbbl	68	0.7	79	59	2.0
Gold	USDOz	4870	0.2	5502	2861	-5.7
Silver	USDOz	78	9.8	117	30	-13.1
Aluminum	USDton	3063	2.0	3252	2275	-2.1
Copper	USDton	12905	0.0	13952	8590	-4.0

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

Countercyclical policies cushion oil volatility: SAMA

Saudi Arabia has relied on its cash reserves to maintain financial and monetary stability, alongside countercyclical fiscal policies to cushion the impact of oil price swings on economic activity, Saudi Central Bank (SAMA) Governor Ayman Alsayari said at the AIUla Emerging Markets Economics Conference. **(Argaam)**

Americana secures 75-year license to develop Malak Al Tawouk across MENA

Americana Restaurants International Plc secured a 75-year exclusive license to develop Malak Al Tawouk across MENA and Kazakhstan through two strategic and complementary transactions. **(Argaam)**

Saudi Regulator Faces Calls to Review IPO Localization Push

Saudi Arabia's markets regulator is being urged to rethink its push to give local retail investors a larger share of initial public offerings, amid concerns the effort risks further weakening listing performance. Several banks have been pressing the Capital Market Authority to reconsider guidance encouraging issuers to allocate as much as 30% of shares in IPOs to retail investors, saying it pushes too much stock toward individuals during a period of weak demand, according to people familiar with the matter. **(Bloomberg)**

Saudi Arabia to launch \$2T economic diversification strategy

Saudi Finance Minister Mohammed Al-Jadaan revealed plans to launch an updated strategy for Crown Prince Mohammed bin Salman's economic diversification agenda, at a value of \$2 trillion. **(Argaam)**

Riyad Bank redeems SAR 3B sukuk due in 2031

Riyad Bank will redeem in full its SAR 3 billion Tier 2 sukuk, due in 2031, the bank said in a statement to Tadawul. The sukuk, trading under the symbol 1013 (Riyad Bank Tier 2 Sukuk), will be called at par value (100% of the issue price) upon the completion of the fifth year today, Feb. 9. **(Argaam)**

Global

China Urges Banks to Curb Exposure to US Treasuries

Chinese regulators have advised financial institutions to rein in their holdings of US Treasuries, citing concerns over concentration risks and market volatility, according to people familiar with the matter. Officials urged banks to limit purchases of US government bonds and instructed those with high exposure to pare down their positions, the people said, asking not to be identified discussing private deliberations. The directive doesn't apply to China's state holdings of US Treasuries. **(Bloomberg)**

UK house prices rise by most since November 2024, Halifax says

British house prices rose by the most in more than a year in January, mortgage lender Halifax said on Friday, adding to signs of a recovery in the housing market after finance minister Rachel Reeves' budget in late November. The 0.7% month-on-month increase was the biggest since November 2024, following a 0.5% fall in prices in December. **(Reuters)**

Commodities

Oil pauses as investors eye US-Iran talks

Oil prices held steady on Friday as investors awaited news from high-stakes talks between the United States and Iran that are taking place in Oman amid fears of another supply-disrupting Middle East conflict. Brent crude futures fell 5 cents, or 0.1%, to \$67.50 a barrel by 1211 GMT, while U.S. West Texas Intermediate crude was down 11 cents, or 0.2%, at \$63.18 a barrel. Brent was set to end the week 4.6% down. WTI was on track to end the week 3.2% lower. **(Zawya)**

Daily Market Report

TASI & NOMU- Key Statistics

		05-Feb	08-Feb	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2369	2369	0.0%	-1.7%	-3.0%
Value	mn	5507	67	-98.8%	-98.2%	-98.5%
Volume	mn	237	150	-36.7%	-25.8%	-33.0%
NOMU						
Market Cap	mn	7699	7699	0.0%	-0.2%	1.5%
Value	mn	18	9	-49.5%	-45.8%	-52.9%
Volume	mn	2	1	-37.5%	-31.5%	-45.5%

*Average for the period, Source: Argaam

TASI-Top Gainers

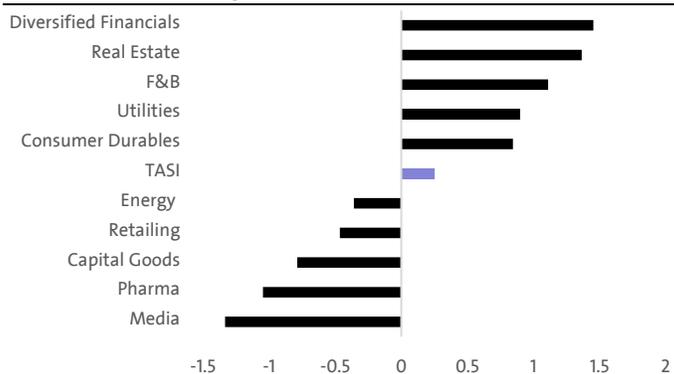
	Last Price	Change	
	SAR/sh	SAR	%
OASIS	2.58	0.17	7%
MEDGULF	15.82	0.79	5%
JAHEZ	14.09	0.63	5%

TASI-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
ABO MOATI	44	-1.62	-4%
TAWUNIYA	133	-4	-3%
CMCER	6.15	-0.17	-3%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
10-Feb	General Authority For Statistics	Industrial Production Index- December 2025
10-Feb	AI RAJHI REIT	Eligibility of cash dividend
10-Feb	ALDAWAA	Eligibility of cash dividend
11-Feb	Kesay	IPO/ Subscription
11-Feb	SAR	IPO/ Subscription

NOMU-Top Gainers

	Last Price	Change	
	SAR/sh	SAR	%
MULKIA	45.88	3.88	9%
TIME	56	4.6	9%
FAD	69.1	5.1	8%

NOMU-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
JAMJOOM FASHION	145	-12	-8%
HKC	28.26	-2.28	-7%
NASEEJ TECH	44	-2.4	-5%

Source: Tadawul

TASI -Most Traded by Volume

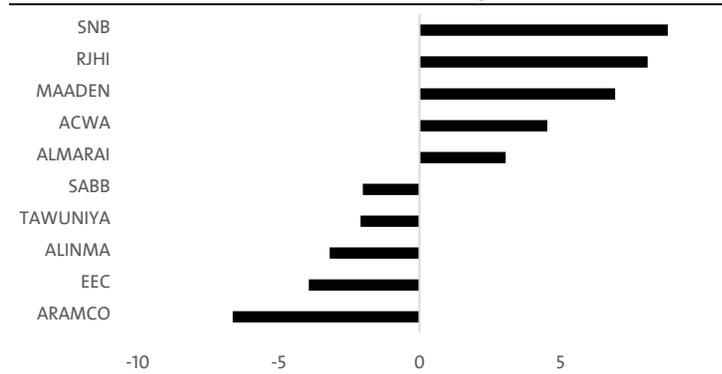
	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
CHEMICAL	8.53	0.25	3%	8.1
SAUDI ARAMCO	25.5	-0.1	0%	6.3
ALINMA	28.24	-0.3	-1%	5.6

TASI -Most Traded by Value

	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	25.5	-0.1	0%	162
ALINMA	28.24	-0.3	-1%	159
ALRAJHI	107.5	0.5	0%	123

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
10-Feb	U.S.	Core Retail Sales MoM	Jan	0.4%	0.2%
11-Feb	U.S.	Average Hourly Earnings	Jan	0.3%	0.2%
11-Feb	C.Y.	Consumer Price Index (YoY)	Jan	0.8%	0.7%
11-Feb	U.S.	10-Year Note Auction	Jan	4.173%	4.175%
14-Feb	C.Y.	New Loans	Jan	820.0B	390.0B

Source: Bloomberg, Investing.Com

Daily Market Report

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