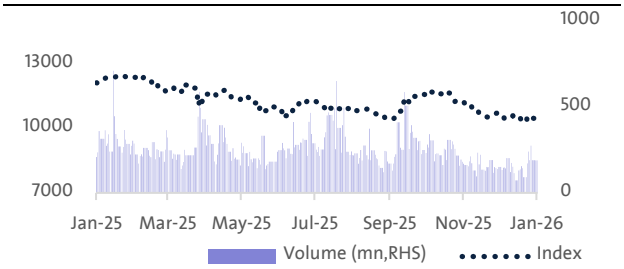
alinma capital الإنماء المالية

Daily Market Report

Key Indices-Return and Valuation

	09-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	11195	-0.19%	-1.6%	6%	17.6	1.6
NOMU	23673	-0.89%	-1.0%	1%	0.0	1.6
S&P500	6965	0.47%	0.4%	2%	25.1	5.5
Dow Jones	50136	0.04%	2.5%	4%	15.4	6.0
FTSE 100	10386	0.16%	1.6%	5%	15.4	2.4
EuroStoxx50	6059	1.01%	1.9%	5%	18.2	2.6
Nikkei225	56364	3.89%	5.7%	12%	22.8	2.7
MSCI EM	1540	2.20%	0.7%	10%	16.7	2.3
SHCOMP	4123	1.41%	0.1%	4%	15.8	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
09-Feb	84	172	10	0.5:1

Money Market Yields

%	SAIBOR			Term SOFR		
	09-Feb	Δ bps	YTD Av	08-Feb	Δ bps	YTD Av
1M	4.71	-1.5	5.6	3.67	-0.5	4.3
3M	4.90	8.5	5.4	3.66	-0.6	4.3
6M	5.20	7.3	5.5	3.62	-0.8	4.2
12M	4.75	-5.3	5.2	3.50	-0.9	4.0

Commodities

		09-Feb	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	68	1.9	80	60	2.5
Brent	USDbbl	69	1.5	79	59	2.0
Gold	USDOz	4993	2.5	5502	2861	-5.9
Silver	USDOz	83	7.1	117	30	-13.4
Aluminum	USDton	3099	1.2	3252	2275	-2.1
Copper	USDton	13045	1.1	13952	8590	-4.1

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

SAR sets final offer price at SAR 45/shr

ANB Capital, the financial advisor, lead manager, bookrunner and underwriter of the initial public offering (IPO) for Saleh Abdulaziz Al Rashed & Sons Co. (SAR) announced completing the book-building process for the institutional tranche subscribed to the offered shares. the company said that the final offer price was set at SAR 45 per share, with a coverage of 67.7x. **(Argaam)**

Kesay's IPO priced at SAR 15/shr on Nomu

Kesay Clinics Co. priced its initial public offering (IPO) on the Nomu-Parallel Market at SAR 15 per share, Estidamah Capital, the financial advisor on the offering, said in a statement to Tadawul. The retail offering will run from Feb. 11-22. **(Argaam)**

Al Akaria receives SAR 61.6M white land tax invoices

Saudi Real Estate Co. (Al Akaria) said the total value of the white land tax invoices issued to the company, as of this date, amounts to SAR 61.64 million. The company said that these invoices cover two tranches. The first tranche (10%) includes a total issued invoices of SAR 56.8 million. **(Argaam)**

Thob Al Aseel explores full acquisition of Al-Tuwaijri under 6-month MoU

Thob Al Aseel Co. signed on Feb. 9 a non-binding memorandum of understanding (MoU) to acquire 100% of Al-Tuwaijri Men's Accessories Co., a limited liability firm, according to a statement to Tadawul. Under the six-month MoU, both parties agreed to commence discussions to study the potential acquisition. **(Argaam)**

Al Mohafaza rents land in Riyadh to set up educational facility

Al Mohafaza Company awarded a lease on Feb 9 for land in Riyadh, with the plan to invest in construction, equipping and operation of an educational facility for a period of 25 years from the signing date. The land in Al-Jazirah district of Riyadh, measures nearly 19,000 square meters **(Argaam)**

Global

NY Fed survey: January near-term expected inflation lower amid better job market views

Americans were less worried about the direction of inflation and labor market prospects as of last month, although concerns about the state of their finances continued to mount, the Federal Reserve Bank of New York said in a report released on Monday. As part of its latest Survey of Consumer Expectations, the bank said that inflation expectations one year from now stood at 3.1% in January compared with 3.4% in December, while at the three- and five-year-ahead horizons, expectations held steady at 3%. **(Reuters)**

Major inflation shift needed for ECB rate change debate, says Kazimir

A major deviation in economic and inflation trends would be needed for the European Central Bank to consider changing policy, Slovak central bank chief Peter Kazimir said on Monday, just days after the bank kept interest rates unchanged. The ECB has been on hold since ending a rate cuts spree in June, arguing that inflation will hold around its 2% target, boosting market bets that policy will be steady all year before possible rate hikes next year. **(Reuters)**

Commodities

Oil drifts lower as traders weigh supply risks amid US–Iran tensions

Oil prices eased slightly on Tuesday as traders gauged the potential for supply disruptions after U.S. guidance for vessels transiting the Strait of Hormuz kept attention squarely on tensions between Washington and Tehran. Brent crude oil futures were down 18 cents, or 0.26%, at $68.85 a barrel by 0353 GMT. U.S. West Texas Intermediate crude fell 21 cents, or 0.33%, to $64.15. **(Reuters)**

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Daily Market Report

TASI & NOMU- Key Statistics						
		08-Feb	09-Feb	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2369	2370	0.1%	-1.6%	-2.9%
Value	mn	3032	4375	44.3%	-7.4%	-7.8%
Volume	mn	150	236	57.5%	8.7%	3.9%
NOMU						
Market Cap	mn	7699	7637	-0.8%	-1.0%	0.7%
Value	mn	9	14	55.9%	-26.4%	-28.4%
Volume	mn	1	1	-22.5%	-42.4%	-56.7%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MUNAWLA	28	2.38	9%
HORIZON EDUCATIONAL	73.85	3.75	5%
PAPER HOME	40.8	1.8	5%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
TIME	49.02	-6.98	-12%
ALSHEHILI METAL	54	-5	-8%
MULKIA	42	-3.88	-8%

Source: Tadawul

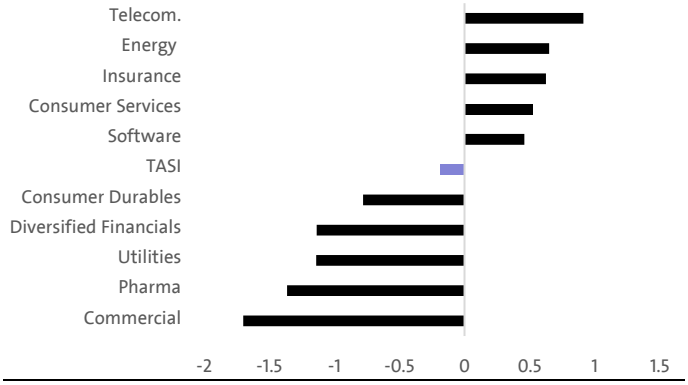
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
AMERICANA	1.79	0.16	10%
CENOMI RETAIL	18.36	1.58	9%
ADVANCED	25.82	1.92	8%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
EAST PIPES	150	-7	-4%
BJAZ	12	-0.55	-4%
ALKHALEEJ TRNG	18.9	-0.8	-4%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.79	0.16	10%	44.9
ALKATHIRI	2.21	0.13	6%	11.5
SAUDI ARAMCO	25.68	0.18	1%	9.7
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
ALRAJHI	107	-0.5	0%	271
SAUDI ARAMCO	25.68	0.18	1%	248
ALINMA	28.6	0.36	1%	200

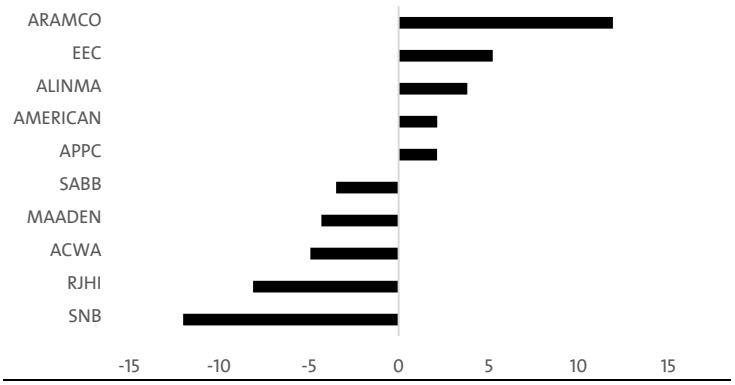
Source: Tadawul

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
10-Feb	General Authority For Statistics	Industrial Production Index- Dec-25
10-Feb	Al RAJHI REIT	Eligibility of cash dividend
10-Feb	ALDAWAA	Eligibility of cash dividend
11-Feb	Kesay	IPO/ Subscription
11-Feb	SAR	IPO/ Subscription

Source: Argaam, GSTAT

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

Classification: Private

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