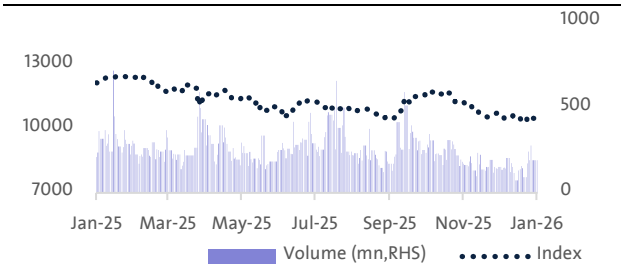
# Daily Market Report

## 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. **(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)**

Please refer to page III for important disclosures

# 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

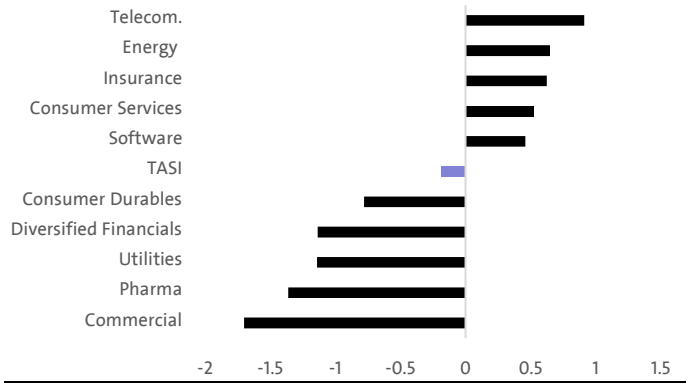
| TASI-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| AMERICANA | 1.79 | 0.16 | 10% |
| CENOMI RETAIL | 18.36 | 1.58 | 9% |
| ADVANCED | 25.82 | 1.92 | 8% |
| **TASI-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| EAST PIPES | 150 | -7 | -4% |
| 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 |

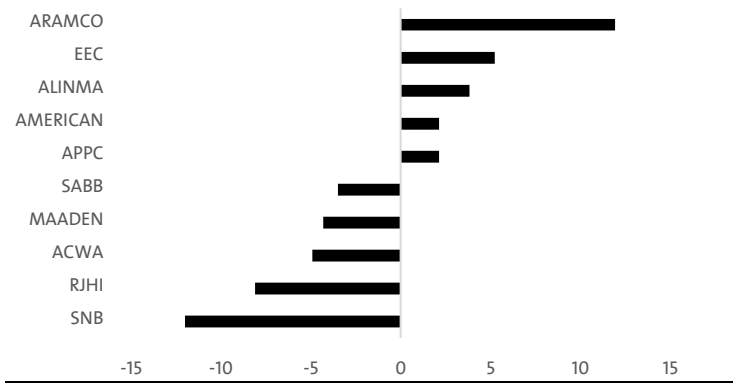
Source: Tadawul

## 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

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