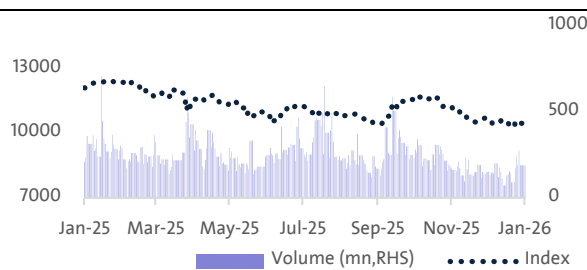


Daily Market Report

Key Indices-Return and Valuation

	24-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11110	-1.2%	-1.5%	5%	15.0	1.6
NOMU	22851	0.0%	1.3%	-3%	0.0	1.6
S&P500	7165	0.8%	9.0%	5%	21.9	5.5
Dow Jones	49231	-0.2%	5.7%	2%	13.1	5.7
FTSE 100	10379	-0.7%	0.1%	5%	13.1	2.4
EuroStoxx50	5883	-0.2%	2.6%	2%	15.6	2.5
Nikkei225	59716	1.0%	11.1%	19%	23.9	2.8
MSCI EM	1610	0.7%	10.5%	15%	12.3	2.4
SHCOMP	4080	-0.3%	3.3%	3%	14.2	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
23-Apr	45	212	12	0.2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	23-Apr	Δ bps	YTD Av	24-Apr	Δ bps	YTD Av
1M	4.65	-7.1	5.6	3.65	0.3	4.3
3M	4.76	-7.4	5.4	3.67	-0.1	4.3
6M	5.25	27.1	5.5	3.68	-0.1	4.2
12M	4.87	17.3	5.2	3.69	0.5	4.0

Commodities

	Unit	24-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	101	1.1	135	60	-3.3
Brent	USDbbbl	105	0.2	118	59	-4.1
Gold	USDOz	4680	-0.4	5502	3171	-14.8
Silver	USDOz	76	0.4	117	32	-28.3
Aluminum	USDton	3669	-0.6	3692	2354	-7.8
Copper	USDton	13295	0.3	13952	9185	-10.0

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

Saudi real GDP nears SAR 5T; non-oil contribution hits record: Vision 2030

Saudi Arabia's economy continues to post robust growth, driven by diversification efforts and the expanding role of non-oil sectors in line with the Vision 2030 objectives. Real GDP has risen markedly since 2016, increasing from around SAR 3.73 trillion to nearly SAR 5 trillion by 2025. **(Argaam)**

SRMG wins ministry contract to provide services for Thaqafeyah Channel

Saudi Research and Media Group (SRMG) secured, on April 23, a contract from the Ministry of Culture to operate and execute satellite and digital broadcasting services, as well as manage and produce media content for Al-Thaqafeyah Channel. Annual value of the contract exceeds 5% of the group's total revenue, according to the latest audited financial statements for 2025. **(Argaam)**

Alramz signs deal to set up SAR 650M real estate fund

Alramz Real Estate Co. said it signed on April 23 an agreement to establish a Shariah-compliant real estate investment fund, to be managed by SNB Capital. The target fund size is SAR 650 million, with Alramz acting as the fund's principal unitholder, the developer and exclusive marketer of the project. **(Argaam)**

Alamar signs SAR 85M facility to finance Five Guys franchise acquisition

Alamar Foods Co. signed a seven-year Shariah-compliant banking facility worth SAR 85 million with Saudi Awwal Bank, according to a statement to Tadawul. The company said the facility will be used to finance the acquisition of the operator of the Five Guys brand in Saudi Arabia, supporting its expansion strategy and diversification of its brand portfolio. **(Argaam)**

Saudi Arabia climbs to 17th in IMD Competitiveness Ranking: Vision 2030

Saudi Arabia's global competitiveness was strengthened by regulatory, legislative, and structural reforms. The Kingdom moved forward more than 20 places in the 2025 IMD World Competitiveness Ranking to 17th rank. **(Argaam)**

Global

Trump safe, suspect in custody after shooting at White House press dinner

Law enforcement officers have taped off the area around the California home of suspect Cole Tomas Allen, who is in custody in Washington, D.C. Crowds of media camped outside as FBI agents and others worked. Around 8:35 p.m. ET (0035 GMT on Sunday), guests at the Washington Hilton dinner took cover when shots were heard, video footage showed. Soon after, Secret Service agents rushed towards Trump, escorting the president and his cabinet from the ballroom. **(Reuters)**

US consumer sentiment slumps to record low in April; inflation expectations rise

U.S. consumer sentiment fell to a record low in April as households shrugged off a ceasefire in the war with Iran, remaining focused on the inflation fallout from the conflict. The University of Michigan's Surveys of Consumers said its Consumer Sentiment Index dropped to a final reading of 49.8 this month, an all-time low. The reading was a slight improvement, however, from the 47.6 reported earlier in the month. **(Reuters)**

Commodities

Oil turns negative as source says Iran-US peace talks likely

Oil turned negative on Friday after a Pakistani government source said Iranian Foreign Minister Abbas Araqchi was expected to arrive in Islamabad on Friday night with a small team and peace talks with the U.S. were likely to take place. Earlier in the session, crude was up more than 2% on concerns of a renewed military escalation in the region after Iran released footage of commandos boarding a cargo ship in the Strait of Hormuz, and a lack of progress in re-opening the key waterway. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		22-Apr	23-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2330	2302	-1.2%	-3.5%	3.3%
Value	mn	4995	6029	20.7%	4.9%	15.6%
Volume	mn	278	327	17.5%	11.5%	28.9%
NOMU						
Market Cap	mn	7375	7372	0.0%	1.3%	-2.8%
Value	mn	15.7	21.2	35.3%	-6.4%	9.1%
Volume	mn	2.1	1.8	-11.9%	-23.4%	-16.4%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
JAHEZ	13.94	1.26	10%
TANMIAH	65.7	4.3	7%
ENAYA	9.18	0.55	6%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALDAWAA	49.36	-3.09	-6%
ADVANCED	26.98	-1.16	-4%
ALBILAD	26.02	-1.02	-4%

Source: Tadawul

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
LANA	3.31	0.76	30%
TAQAT	12.2	0.8	7%
NGDC	30.44	1.74	6%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
NAAS PETROL	31	-3	-9%
FOOD GATE	23	-2	-8%
MUNAWLA	21.81	-1.74	-7%

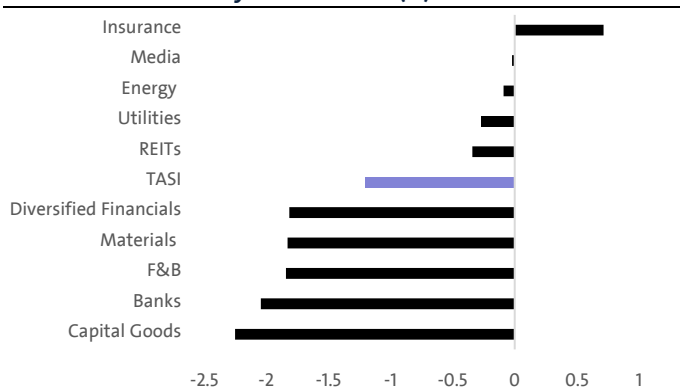
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BAAN	1.98	-0.02	-1%	19.9
JAHEZ	13.94	1.26	10%	14.5
ALWASAIL INDUSTRIAL	3.06	0.07	2%	14.1

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	70.25	-1.45	-2%	447
SAUDI ARAMCO	27.26	0.1	0%	261
SNB	40.52	-0.18	0%	233

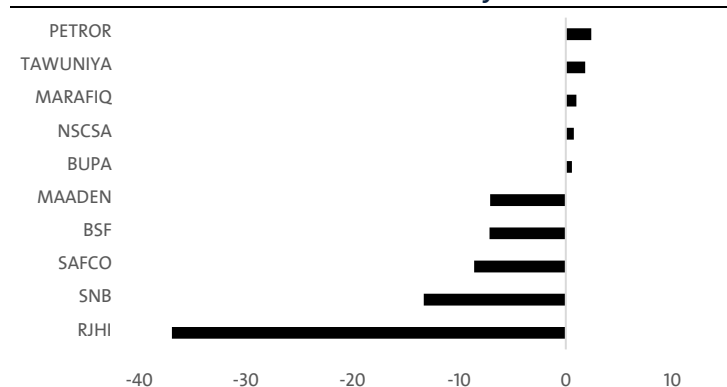
Source: Tadawul

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
26-April	MAHARAH	Eligibility of Cash Dividend
26-April	ALSAIF GALLERY	Eligibility of Cash Dividend
29-April	SAUDI CEMENT	Eligibility of Cash Dividend
29-April	RIYADH BANK	Earnings call
30-April	DAR AL BALAD	End of IPO book building

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
28-Apr	U.S.	Consumer Confidence	Apr	87.8	91.0
29-Apr	U.S.	Durable Goods Orders	Apr	-1.1%	-0.5%
30-Apr	C.Y.	Manufacturing PMI	Apr	50.1	49.0
30-Apr	U.K.	Interest Rate Decision	Apr	3.75%	3.75%
30-Apr	E.U.	Interest Rate Decision	Apr	2.15%	2.15%

Source: Bloomberg, Investing.Com

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