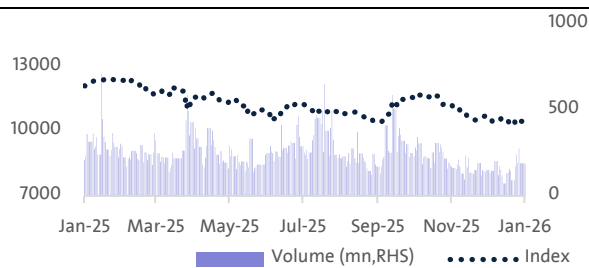


# Daily Market Report

## Key Indices-Return and Valuation

|             | 29-Apr* | DoD   | MTD   | YTD | P/E  | P/BV |
|-------------|---------|-------|-------|-----|------|------|
| TASI        | 11238   | 0.5%  | -0.3% | 7%  | 15.1 | 1.6  |
| NOMU        | 22876   | -0.1% | 1.5%  | -3% | 0.0  | 1.6  |
| S&P500      | 7136    | 0.0%  | 8.5%  | 4%  | 21.7 | 5.6  |
| Dow Jones   | 48862   | -0.6% | 4.9%  | 2%  | 12.9 | 5.6  |
| FTSE 100    | 10213   | -1.2% | -1.5% | 3%  | 12.9 | 2.3  |
| EuroStoxx50 | 5816    | -0.3% | 1.5%  | 0%  | 15.4 | 2.5  |
| Nikkei225   | 59917   | 0.0%  | 11.5% | 19% | 24.0 | 2.9  |
| MSCI EM     | 1618    | 0.1%  | 11.0% | 15% | 12.4 | 2.4  |
| SHCOMP      | 4108    | 0.7%  | 4.0%  | 3%  | 14.3 | 1.6  |

## TASI- Index and Volume Trends



## Advance to Decline Ratio

|        | Advance | Decline | Unchanged | A/D   |
|--------|---------|---------|-----------|-------|
| 29-Apr | 160     | 93      | 17        | 1.7:1 |

## Money Market Yields

| %   | SAIBOR |       |        | Term SOFR |       |        |
|-----|--------|-------|--------|-----------|-------|--------|
|     | 29-Apr | Δ bps | YTD Av | 29-Apr    | Δ bps | YTD Av |
| 1M  | 4.65   | 0.0   | 5.6    | 3.65      | -0.7  | 4.3    |
| 3M  | 4.73   | -2.5  | 5.4    | 3.66      | -0.6  | 4.3    |
| 6M  | 5.19   | -6.2  | 5.5    | 3.67      | -0.4  | 4.2    |
| 12M | 4.86   | -1.3  | 5.2    | 3.68      | 0.0   | 4.0    |

## Commodities

|            | Unit    | 29-Apr |      | Δ     | 52-week |       | YTD Av |
|------------|---------|--------|------|-------|---------|-------|--------|
|            |         | USD    | %    |       | Hi      | low   |        |
| Arab Light | USDbbbl | 105    | 1.7  | 135   | 60      | -3.6  |        |
| Brent      | USDbbbl | 118    | 6.1  | 118   | 59      | -4.5  |        |
| Gold       | USDOz   | 4565   | -1.0 | 5502  | 3171    | -15.1 |        |
| Silver     | USDOz   | 71     | -2.4 | 117   | 32      | -28.7 |        |
| Aluminum   | USDton  | 3547   | -1.3 | 3692  | 2354    | -8.1  |        |
| Copper     | USDton  | 13075  | 0.7  | 13952 | 9185    | -10.3 |        |

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 GDP rises 2.8% in Q1 2026

Saudi Arabia's real gross domestic product (GDP) rose 2.8% year-on-year (YoY) in Q1 2026. Oil activities increased by 2.3%, while non-oil activities grew 2.8%. Government activities rose 1.5%, according to flash estimates published by the General Authority for Statistics. **(Argaam)**

### Tadawul re-suspends trading of 6 stocks for delayed earnings disclosure

Saudi Exchange (Tadawul) announced the re-suspension of trading in shares of six listed companies, effective April 30, 2026, for failing to disclose their annual financial statements for the period ended Dec. 31, 2025, within the regulatory deadline. The stocks halted on TASI are Nama Chemicals Co., Methanol Chemicals Co. (Chemanol) and Aldawaa Medical Services Co. The Nomu-listed Rawasi Albina Investment Co., Osool & Bakheet Investment Co. and Amwaj International Co. were also suspended. The suspension will continue until the financial statements are disclosed. **(Argaam)**

### Sumou signs deal to develop 149 villas in Al Dhahiya project

Sumou Real Estate Co. signed an agreement to manage the development of the superstructure for Al Dhahiya Residence project in Makkah. The project involves the construction of 149 villas, in partnership with Al Dhahiya Real Estate. **(Argaam)**

### Alamar completes Five Guys franchise acquisition in Saudi Arabia

Alamar Foods Co. said it completed the buyout of Al Shaghaf Arabia LLC, which owns the exclusive franchise rights for the Five Guys brand in Saudi Arabia. The final transaction consideration was SAR 84.4 million, with the relevant financial impact appearing in financial statements as of Q2 2026. **(Argaam)**

### CMA OKs Alasmak's rights offering to raise capital

The Capital Market Authority (CMA) approved a request submitted by Saudi Fisheries Co. (Alasmak) to increase its capital through a SAR 334.93 million rights issue. In a statement, the market regulator said eligibility will be limited to shareholders of record registered with Securities Depository Center (Edaa) at the end of the second trading day following the deciding extraordinary general meeting (EGM). The meeting date will be set by the company's board at a later stage. **(Argaam)**

## Global

### US war in Iran has cost \$25 billion so far, says Pentagon official

The United States' war in Iran has cost \$25 billion so far, a senior Pentagon official said on Wednesday, providing the first official estimate of the military's price tag for the conflict. With just six months before midterm elections in which President Donald Trump's Republicans may face an uphill battle to keep their House majority, Democrats are riding high in public opinion polls as they attempt to link the unpopular Iran war with affordability. **(Reuters)**

### BOJ sees inflation moving around 3% in risk scenario

The Bank of Japan saw core inflation hovering around 3%, well above its 2% target, for two years in a row under a risk scenario released on Thursday that assumed elevated oil prices and a weakening yen. **(Reuters)**

## Commodities

### Oil prices surge to highest level since 2022 as Trump mulls Iran blockade extension

Oil prices surpassed \$123 a barrel on Thursday morning, its highest price since 2022, as President Donald Trump mulls an extended blockade of Iranian ports. Brent crude, the global benchmark, was up more than 12% early Thursday, hitting \$126 at one point. WTI crude, the US benchmark, was up more than 3%, surpassing \$110 per barrel. **(CNN)**

## Daily Market Report

## TASI &amp; NOMU- Key Statistics

|             |     | 28-Apr | 29-Apr | Δ%         |             |             |
|-------------|-----|--------|--------|------------|-------------|-------------|
| <b>TASI</b> | SAR |        |        | <b>DoD</b> | <b>MTD*</b> | <b>YTD*</b> |
| Market Cap  | bn  | 2317   | 2329   | 0.5%       | -2.4%       | 4.5%        |
| Value       | mn  | 5350   | 5826   | 8.9%       | 3.3%        | 11.8%       |
| Volume      | mn  | 313    | 351    | 12.2%      | 17.8%       | 36.6%       |
| <b>NOMU</b> |     |        |        |            |             |             |
| Market Cap  | mn  | 7384   | 7380   | -0.1%      | 1.5%        | -2.7%       |
| Value       | mn  | 24.6   | 24.1   | -1.8%      | 4.9%        | 22.5%       |
| Volume      | mn  | 3.9    | 3.3    | -15.3%     | 25.2%       | 45.0%       |

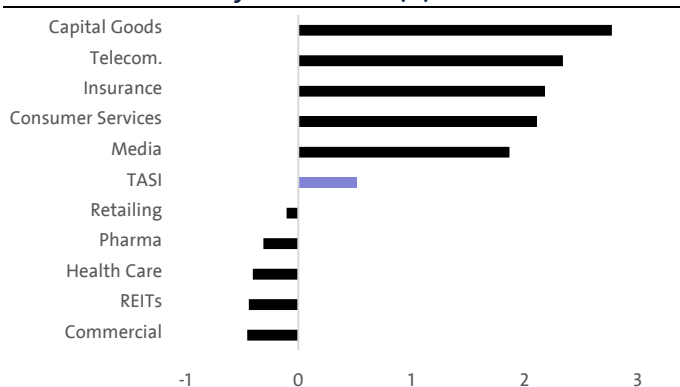
\*Average for the period, Source: Argaam

| TASI-Top Gainers | Last Price | Change |     |
|------------------|------------|--------|-----|
|                  | SAR/sh     | SAR    | %   |
| LUBEREF          | 123.2      | 11.2   | 10% |
| RED SEA          | 24.43      | 2.22   | 10% |
| AMERICANA        | 2.05       | 0.18   | 10% |

| TASI-Top Losers | Last Price | Change |     |
|-----------------|------------|--------|-----|
|                 | SAR/sh     | SAR    | %   |
| AMAK            | 81.8       | -3.85  | -4% |
| ALDAWAA         | 46.8       | -2.02  | -4% |
| BSF             | 19.66      | -0.44  | -2% |

Source: Tadawul

## TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

## TASI Market Calendar

| Date     | Stock/Data release | Event                        |
|----------|--------------------|------------------------------|
| 30-April | DAR AL BALAD       | End of IPO book building     |
| 30-April | SAMA               | Monthly Bulletin             |
| 30-April | LAMASAT            | Eligibility of Cash Dividend |
| 03-May   | CLEAN LIFE         | Eligibility of Cash Dividend |
| 03-May   | MAADEN             | General Assembly             |

Source: Argaam, GSTAT

| NOMU-Top Gainers | Last Price | Change |     |
|------------------|------------|--------|-----|
|                  | SAR/sh     | SAR    | %   |
| NBM              | 50.95      | 7.27   | 17% |
| LANA             | 3.4        | 0.29   | 9%  |
| SAMA WATER       | 2.2        | 0.09   | 4%  |

| NOMU-Top Losers | Last Price | Change |      |
|-----------------|------------|--------|------|
|                 | SAR/sh     | SAR    | %    |
| HORIZON FOOD    | 35         | -4.9   | -12% |
| ITMAM           | 14         | -1     | -7%  |
| MULTI BUSINESS  | 8.45       | -0.54  | -6%  |

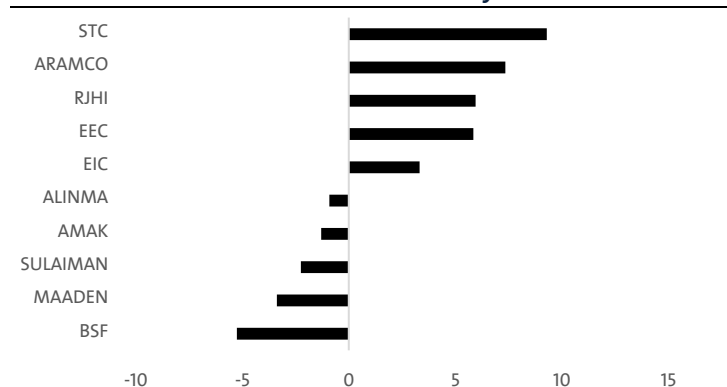
Source: Tadawul

| TASI -Most Traded by Volume | Last Price | Change |     | Volumes |
|-----------------------------|------------|--------|-----|---------|
|                             | SAR/sh     | SAR    | %   | mn      |
| AMERICANA                   | 2.05       | 0.18   | 10% | 53.0    |
| APC                         | 7.33       | 0.29   | 4%  | 36.0    |
| SAUDI KAYAN                 | 5.92       | 0.12   | 2%  | 20.6    |

| TASI -Most Traded by Value | Last Price | Change |    | Value |
|----------------------------|------------|--------|----|-------|
|                            | SAR/sh     | SAR    | %  | SARmn |
| SAUDI ARAMCO               | 27.58      | 0.12   | 0% | 358   |
| STC                        | 43.84      | 1.02   | 2% | 293   |
| ALRAJHI                    | 69.35      | 0.25   | 0% | 292   |

Source: Tadawul

## TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

## Global Market Calendar

| Date   | Country | Event                             | Period | Forecast | Previous |
|--------|---------|-----------------------------------|--------|----------|----------|
| 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%    |
| 01-May | U.S.    | Manufacturing Purchasing Managers | Apr    | 52.3     | 52.4     |
| 05-May | U.S.    | JOLTS Job Openings                | Apr    | 6.890M   | 7.240M   |

Source: Bloomberg, Investing.Com

# Daily Market Report

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