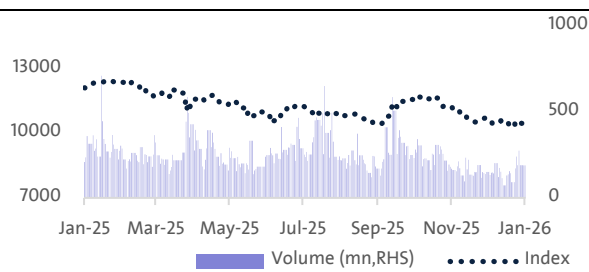


# Daily Market Report

## Key Indices-Return and Valuation

	08-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11339	2.3%	0.6%	7%	15.4	1.5
NOMU	22633	1.5%	0.4%	-4%	0.0	1.5
S&P500	6783	2.5%	3.2%	-1%	20.9	5.2
Dow Jones	47910	2.8%	2.9%	0%	13.7	5.3
FTSE 100	10609	2.5%	2.4%	7%	13.7	2.4
EuroStoxx50	5913	5.0%	3.2%	2%	15.9	2.4
Nikkei225	56308	5.4%	4.8%	12%	22.8	2.5
MSCI EM	1540	5.5%	5.6%	10%	12.0	2.2
SHCOMP	3995	2.7%	1.2%	1%	16.4	1.5

## TASI- Index and Volume Trends



## Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
08-Apr	256	11	2	23:1

## Money Market Yields

%	SAIBOR			Term SOFR		
	08-Apr	Δ bps	YTD Av	08-Apr	Δ bps	YTD Av
1M	4.72	-2.7	5.6	3.66	0.1	4.3
3M	4.85	-9.2	5.4	3.68	0.0	4.3
6M	5.25	-2.8	5.5	3.70	0.1	4.2
12M	4.77	-4.9	5.2	3.74	0.5	4.0

## Commodities

	Unit	08-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	92	-17.9	135	60	-1.4
Brent	USDbbbl	95	-13.3	118	59	-1.9
Gold	USDOz	4798	2.5	5502	3003	-13.2
Silver	USDOz	74	1.5	117	30	-25.3
Aluminum	USDton	3498	-1.3	3596	2275	-5.7
Copper	USDton	12655	2.5	13952	8590	-8.4

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

### Alkhorayef signs SAR 52.2M O&M contract in Jazan

Alkhorayef Water and Power Technologies Co. (AWPT) signed on April 8, a contract with National Water Co. (NWC), valued at SAR 52.2 million (excluding VAT), the contract covers the operation and maintenance of water and wastewater networks in the southern region governorates, along with their centers and villages in Jazan, for a duration of 36 months. **(Argaam)**

### Shalfa board approves transition to TASI

Shalfa Facilities Management Co.'s board approved on April 8 the company's transition from Nomu-Parallel Market to the Main Market (TASI), according to a statement to Tadawul. The board also decided to appoint Value Capital as financial advisor to manage the company's transition file to the Main Market. **(Argaam)**

### IHR secures Hajj outsourcing deal at SAR 12.04M from Elm

International Human Resources Co. received on April 8 a SAR 12.04 million (VAT inclusive) purchase order from Elm Co. to provide human resources services during the Hajj season under an outsourcing arrangement. This will extend for a period of approximately two and a half months starting from the date of receiving the purchase order. **(Argaam)**

### Saudi AZM wins project with SCE

Saudi AZM for Communication and Information Technology Co. was awarded a project with the Saudi Council of Engineers (SCE) to develop, operate, the Arbitration Center and the Technical Consultancy Services. The company said the project value may exceed 5% of its total revenues for 2025, as the revenue value is variable and dependent on the volume of requests. **(Argaam)**

### Multi Business wins project with stc

Multi Business Group Co. was awarded a purchase order by Saudi telecom giant stc for the fit-out works for the gym at the head office, alongside the restoration and enhancement of work environment and outlet agreement, at a value exceeding 5% of the former's total revenues for 2025. **(Argaam)**

## Global

### UK builders report biggest leap in cost inflation on record

British construction firms reported the biggest rise in cost inflation from one month to the next on record in March and the Iran war also hit new orders and confidence in the sector, a survey showed on Wednesday. S&P Global's UK Construction Purchasing Managers' Index (PMI) measure of input cost inflation leapt to 70.5 from 59.5 in February, the biggest such jump since the series began in 1997 and reaching its highest level outright since November 2022. **(Reuters)**

## Commodities

### Goldman Sachs lowers second-quarter 2026 oil price forecasts on US-Iran ceasefire

Goldman Sachs trimmed its second-quarter 2026 forecasts for Brent and U.S. crude to \$90 and \$87 a barrel, respectively, after the U.S. and Iran agreed on a two-week ceasefire. Previously, the bank forecast Brent and West Texas Intermediate (WTI) oil prices to average \$99 and \$91 a barrel, respectively. **(ZAWYA)**

### Refined fuel prices retreat in Asia, but still show supply stress

Prices for refined fuels in Asia fell sharply in line with similar declines for crude oil in the wake of the tentative ceasefire between the United States and Iran, but remain at levels that point to a supply crunch. **(Reuters)**

## Daily Market Report

## TASI &amp; NOMU- Key Statistics

		07-Apr		08-Apr		Δ%	
TASI	SAR			DoD	MTD*	YTD*	
Market Cap	bn	2298	2350	2.3%	-1.6%	5.4%	
Value	mn	5706	8437	47.9%	35.8%	63.0%	
Volume	mn	283	406	43.5%	27.8%	62.5%	
NOMU							
Market Cap	mn	7190	7301	1.5%	0.4%	-3.8%	
Value	mn	29.2	26.5	-9.0%	4.2%	38.1%	
Volume	mn	2.2	2.6	15.7%	10.0%	20.2%	

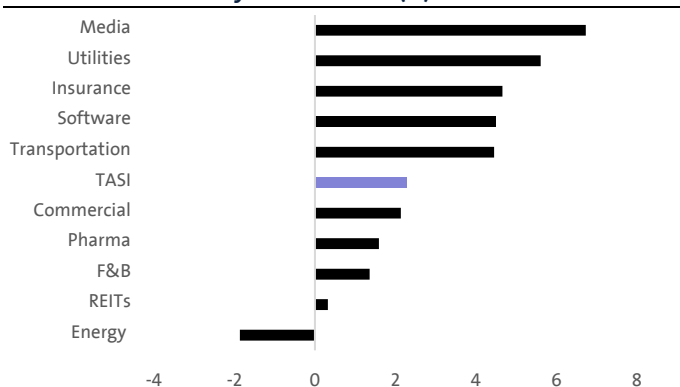
\*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SFICO	44.9	4.08	10%
GULF UNION ALAHLIA	11.22	1.02	10%
UCA	3.14	0.28	10%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SISCO HOLDING	31.12	-2.86	-8%
PETRO RABIGH	10.12	-0.67	-6%
YANSAB	33.8	-1.9	-5%

Source: Tadawul

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



Source: Bloomberg

## TASI Market Calendar

Date	Stock/Data release	Event
09-April	A.OTHAIM MARKET	Cash dividends
09-April	ALMAWARID	Eligibility of Cash Dividend
10-April	ZOUJAJ	Eligibility of Cash Dividend
13-April	Yamama cement	Eligibility of Cash Dividend
13-April	LUBEREF	Eligibility of Cash Dividend

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SIGN WORLD	13.51	1.95	17%
ALMODAWAT	4.3	0.6	16%
FIRST AVENUE	6.26	0.71	13%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
NASEEJ TECH	36.4	-3.6	-9%
FOOD GATE	24	-2	-8%
THARWAH	34.1	-2.3	-6%

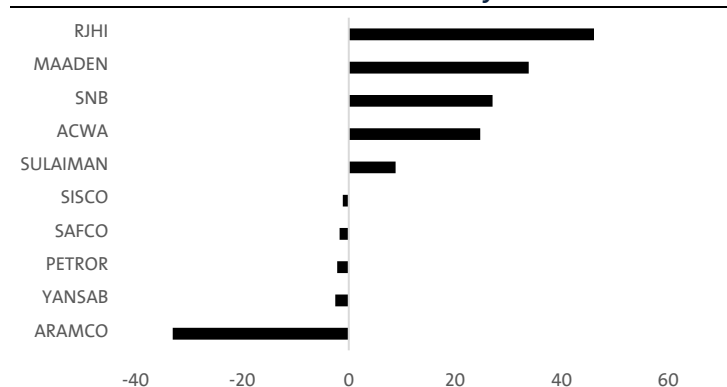
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.89	0.04	2%	48.1
CHEMICAL	8.2	0.72	10%	32.9
SAUDI ARAMCO	26.98	-0.54	-2%	25.7

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.98	-0.54	-2%	692
ALRAJHI	107.7	2.9	3%	638
SABIC AGRU-NUTRIENTS	148.5	-1.5	-1%	293

Source: Tadawul

## TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

## Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
09-Apr	U.S.	30-Year Bond Auction			4.750%
10-Apr	U.S.	Core Consumer Price Index (CPI)	Mar	0.2%	0.3%
10-Apr	C.Y.	Consumer Price Index (CPI) YoY	Mar	0.9%	0.2%
13-Apr	U.S.	Existing Home Sales	Mar	3.89M	4.02M
14-Apr	U.S.	Producer Price Index (PPI) MoM	Mar	0.3%	0.5%

Source: Bloomberg, Investing.Com

# Daily Market Report

**Contact Us:****Alinma Capital Company****Research Department (Sell-Side)**Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh  
55560

Saudi Arabia

Phone: 011-2185555 =86309

E-mail: [research@alinmacapital.com](mailto:research@alinmacapital.com)**Disclaimer**

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## Daily Market Report

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