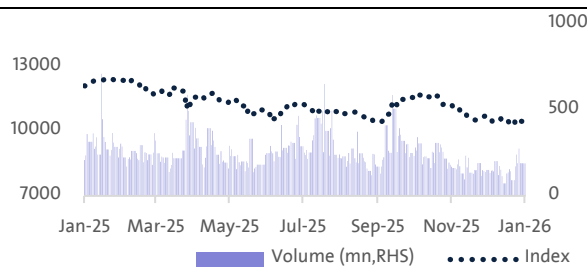


Daily Market Report

Key Indices-Return and Valuation

	10-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11343	0.0%	0.6%	8%	15.5	1.5
NOMU	22671	0.2%	0.5%	-4%	0.0	1.5
S&P500	6817	-0.1%	3.7%	0%	21.0	5.3
Dow Jones	47917	-0.6%	2.9%	0%	13.6	5.5
FTSE 100	10601	0.0%	2.3%	7%	13.6	2.4
EuroStoxx50	5926	0.5%	3.4%	2%	15.9	2.5
Nikkei225	56924	1.8%	5.9%	13%	23.0	2.7
MSCI EM	1547	1.2%	6.2%	10%	12.4	2.3
SHCOMP	3986	0.5%	1.0%	0%	16.5	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
09-Apr	70	188	11	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	09-Apr	Δ bps	YTD Av	10-Apr	Δ bps	YTD Av
1M	4.69	-6.1	5.6	3.65	-0.7	4.3
3M	4.76	-18.3	5.4	3.67	-1.0	4.3
6M	5.22	-6.2	5.5	3.68	-2.2	4.2
12M	4.78	-4.2	5.2	3.69	-5.9	4.0

Commodities

	Unit	10-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	97	0.4	135	60	-1.9
Brent	USDbbbl	95	-0.8	118	59	-2.5
Gold	USDOz	4748	0.4	5502	3171	-13.6
Silver	USDOz	76	0.7	117	32	-26.0
Aluminum	USDton	3565	2.6	3596	2330	-6.2
Copper	USDton	12757	1.6	13952	9119	-8.8

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 foreign reserve assets hit SAR 1.86T, at 6-yr high

Saudi Arabia's foreign reserve assets increased by about SAR 76.2 billion, or 4%, month-on-month (MoM) in March, reaching SAR 1.86 trillion, maintaining a six-year high. Year-on-year (YoY), net foreign assets rose 9%, or SAR 158.8 billion, according to the Saudi Central Bank (SAMA). **(Argaam)**

ADES extends offshore rig contract in Nigeria; adds SAR 178M to backlog

Ades Holding Co. secured a one-year extension for the jack-up offshore rig Shelf Drilling Scepter contract with Chevron Nigeria, with an additional one-year extension option that remains unpriced. In a statement to Tadawul, the company said the extension adds around SAR 178 million to its confirmed backlog. **(Argaam)**

Batic purchases 90 MAN trucks at SAR 39.1M

Batic Investments and Logistics Co. said that the total value of the deal concluded by its wholly owned subsidiary Saudi Transport and Investment Co. (Mubarrad), to purchase 90 MAN 20-ton truck heads (2026 model), amounted to SAR 39.1 million (including VAT) **(Argaam)**

Saudi box office 2025: SAR 921M revenue, 18.8M tickets sold

The Saudi box office recorded revenues of around SAR 921 million in 2025, marking annual growth of 9%, driven by the sale of 18.8 million tickets. According to the annual report issued by the Saudi Film Commission, the average ticket price reached SAR 49, while 538 films were screened in cinemas. **(Argaam)**

Al Kuzama inks deal to acquire 25% of catering firm for SAR 35M

Al Kuzama Trading Co. signed, on April 9, a sale and purchase agreement (SPA) to acquire 25% stake in Unique Food Catering Company (a single-member LLC) for SAR 35 million. The company said the agreement includes the usual terms, conditions and guarantees provided by each party as is customary in such transactions, including the completion of due diligence and the signing of final agreements between the parties. **(Argaam)**

Global

US-Iran peace talks end without agreement, delegations leave Pakistan

The U.S. and Iran failed to reach an agreement to end their war despite marathon talks that concluded on Sunday in the Pakistani capital Islamabad, jeopardising a fragile ceasefire. Each side blamed the other for the failure of the 21-hour negotiations to end fighting that has killed thousands and sent global oil prices soaring since it began over six weeks ago. **(Reuters)**

US inflation accelerates to highest level since May 2024

The US inflation rate accelerated in March, driven by rising oil prices amid the US war with Iran, alongside the continued pass-through of tariffs to consumers. The annual Consumer Price Index rose to its highest level since May 2024, supported by a 12.5% increase in energy prices during March, with gasoline prices leaping 18.9% year-on-year (YoY). **(Reuters)**

Commodities

Saudi Energy Facilities, East-West Pipeline Affected by Attacks Recover and Restore Operational Capacity

The Saudi Ministry of Energy announced on Sunday the success of operational and technical efforts in restoring the full pumping capacity through the East-West pipeline, amounting to approximately seven million barrels per day, and recovering the affected volumes from the Manifa field production of around 300,000 barrels per day, all within a short period of time. **(asharq al-awsat)**

Daily Market Report

TASI & NOMU- Key Statistics

		08-Apr		09-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%	

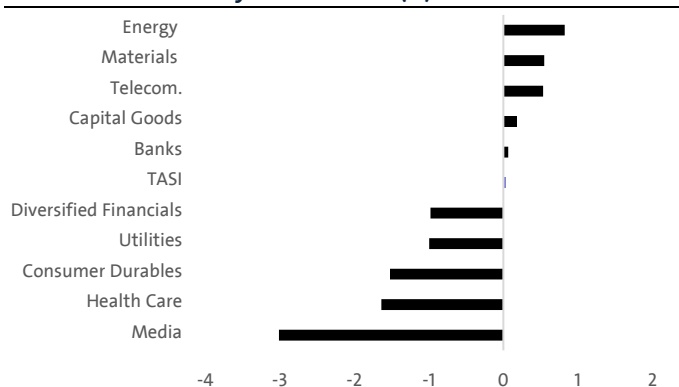
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALWASAIL INDUSTRIAL	2.82	0.14	5%
PETRO RABIGH	10.55	0.43	4%
GULF UNION ALAHLIA	11.66	0.44	4%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SRMG	81.55	-3.5	-4%
SACO	24.61	-0.99	-4%
NASEEJ	23.7	-0.9	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
12-April	ZOUJAJ	Eligibility of Cash Dividend
12-April	MIS	Cash Dividend
13-April	LUBEREF	Eligibility of Cash Dividend
13-April	Yamama cement	Eligibility of Cash Dividend
14-April	ALAMAR	Eligibility of Cash Dividend

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALRASHEED	78	7	10%
MULKIA	42.9	3.7	9%
THARWAH	37	2.9	9%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
AICTEC	1.55	-0.13	-8%
RIYAL	16.68	-1.32	-7%
SIGN WORLD	12.6	-0.91	-7%

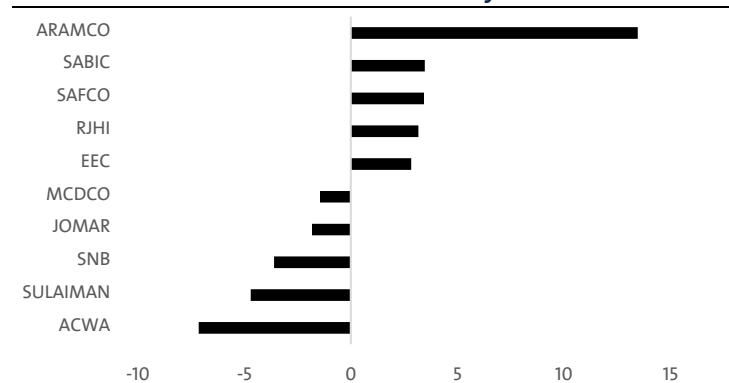
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
BATIC	2.25	0.01	0%	15.8
SAUDI ARAMCO	27.2	0.22	1%	15.6
AMERICANA	1.89	0	0%	15.5

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27.2	0.22	1%	423
ALRAJHI	107.9	0.2	0%	352
SABIC AGRI-NUTRIENTS	151.5	3	2%	214

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
15-Apr	E.U.	Industrial Production MoM	Mar	0.6%	-0.6%
16-Apr	CY.	Gross Domestic Product (GDP) YoY	Mar	4.5%	4.8%
17-Apr	E.U.	Trade balance	Mar	12.8B	11.2B

Source: Bloomberg, Investing.Com

Daily Market Report

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