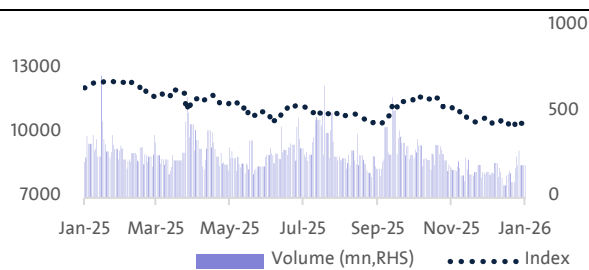


Daily Market Report

Key Indices-Return and Valuation

	25-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	11080	1.2%	3.5%	5%	15.2	1.5
NOMU	22552	0.3%	-1.1%	-4%	0.0	1.5
S&P500	6592	0.5%	-4.2%	-4%	20.4	5.1
Dow Jones	46429	0.7%	-5.2%	-3%	13.3	5.3
FTSE 100	10107	1.4%	-7.4%	2%	13.3	2.2
EuroStoxx50	5649	1.2%	-8.0%	-2%	15.2	2.3
Nikkei225	53750	2.9%	-8.7%	7%	21.6	2.5
MSCI EM	1473	2.0%	-8.6%	5%	12.0	2.1
SHCOMP	3932	1.30%	-5.6%	-1%	15.4	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
25-Mar	244	17	5	14:1

Money Market Yields

%	SAIBOR			Term SOFR		
	25-Mar	Δ bps	YTD Av	25-Mar	Δ bps	YTD Av
1M	4.69	-5.2	5.6	3.68	0.2	4.3
3M	4.91	-18.5	5.4	3.71	-0.5	4.3
6M	5.11	3.2	5.5	3.74	-1.2	4.2
12M	4.89	3.2	5.2	3.78	-4.0	4.0

Commodities

	Unit	25-Mar	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbl	102	-11.9	135	60	0.3
Brent	USDbbl	102	-2.2	112	59	0.2
Gold	USDOz	4556	3.1	5502	3003	-12.0
Silver	USDOz	71	0.0	117	30	-23.1
Aluminum	USDton	3292	-0.5	3550	2275	-4.5
Copper	USDton	12235	2.2	13952	8590	-7.6

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 Arabia issues 161 industrial licenses, 107 factories begin ops in January

Saudi Arabia's Ministry of Industry and Mineral Resources issued 161 new industrial licenses in January, while 107 factories began production during the same month, according to a report by the ministry's National Center for Industrial and Mining Information. **(Argaam)**

Saudi residential real estate transaction values fall 56% in February

Real estate transactions in Saudi Arabia declined in February 2026, with a marked drop in the number and value of residential and non-residential transactions compared with the same period in 2025. **(Argaam)**

SABIC AN gets feedstock approval for ammonia, urea plant

SABIC Agri-Nutrients Co. (SABIC AN) received, on March 25, the Ministry of Energy's approval to allocate the necessary feedstock for the establishment of its seventh plant in Jubail Industrial City, according to a Tadawul statement. The new plant will produce 1.2 million metric tons per annum (mtpa) of conventional ammonia and 2.6 mtpa of urea. **(Argaam)**

Arabian Drilling temporarily suspends some GCC offshore rigs

Arabian Drilling Co. temporarily suspended operations at some of its offshore drilling rigs in the GCC region due to the current regional situation, it said in a statement to Tadawul today, March 26. **(Argaam)**

Balady completes feed plant, starts operations

Balady Poultry Trading Co. (Balady Poultry) said it has completed construction of a feed production plant and begun operations. The plant includes three poultry feed production lines with a total capacity of 60 tons per hour, the company said in a statement to Tadawul, adding that the financial impact is expected to be reflected from the second quarter of 2026. **(Argaam)**

Global

Bank of Japan's new trend gauge shows inflation exceeding target

The Bank of Japan said on Thursday the core consumer price index rose 2.2% excluding special factors in February, releasing the new gauge for the first time in what analysts say is an effort to show underlying inflation on track for further rate hikes. **(Reuters)**

US import prices post biggest increase in four years amid broad rise in goods

U.S. import prices increased by the most in four years in February as energy costs surged in anticipation of conflict in the Middle East, adding to signs that inflation is poised to accelerate in the months ahead. **(Reuters)**

ECB's Lagarde opens door to rate hikes if Iran conflict pushes up inflation

European Central Bank President Christine Lagarde opened the door on Wednesday to raising interest rates in the euro zone if war in the Middle East pushes up euro zone inflation for some time. **(Reuters)**

Commodities

Oil jumps over 2%; Brent crosses \$104

Global oil prices rose during trading today, March 26, recovering from losses in the previous session, amid growing concerns that continued conflict in the Middle East could further disrupt global energy flows. Brent crude was trading up 2.4% at \$104.67 a barrel, at 09:01 am Makkah time. West Texas Intermediate (WTI) rose 2.3% to \$92.38 a barrel. **(Argaam)**

Daily Market Report

TASI & NOMU- Key Statistics

		24-Mar	25-Mar	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2318	2346	1.2%	-1.3%	-3.9%
Value	mn	8510	5711	-32.9%	-9.3%	21.0%
Volume	mn	326	259	-20.6%	0.6%	9.7%
NOMU						
Market Cap	mn	7256	7275	0.3%	-0.2%	-4.1%
Value	mn	20.7	18.1	-12.8%	23.8%	-5.4%
Volume	mn	1.7	2.8	66.0%	43.3%	22.3%

*Average for the period, Source: Argaam

TASI-Top Gainers

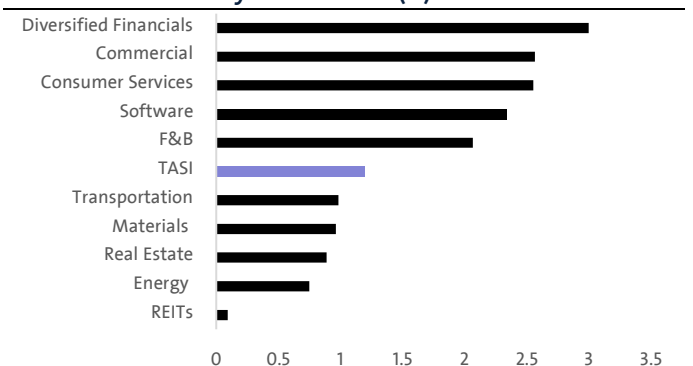
	Last Price	Change	
	SAR/sh	SAR	%
SIDC	11.09	0.84	8%
RASAN	137.6	9.6	8%
CHERRY	25.7	1.66	7%

TASI-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
YANSAB	32.04	-0.9	-3%
MCDC	85.15	-2.3	-3%
MEFIC REIT	3.61	-0.1	-2%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
26-Mar	Sabiq Agri	EOGM
26-Mar	Al Hammadi	EOGM
26-Mar	Nahdi	EOGM
29-Mar	Bidaya	Listing Date
29-Mar	EIV	Cash Dividend Distribution

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MULKIA	44.48	7.7	21%
RIYADH STEEL	1.6	0.21	15%
PAPER HOME	40.9	3.54	9%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
TMC	10.02	-1	-9%
ACADEMY OF LEARNING	6.51	-0.5	-7%
DRC	26.24	-1.8	-6%

Source: Tadawul

TASI -Most Traded by Volume

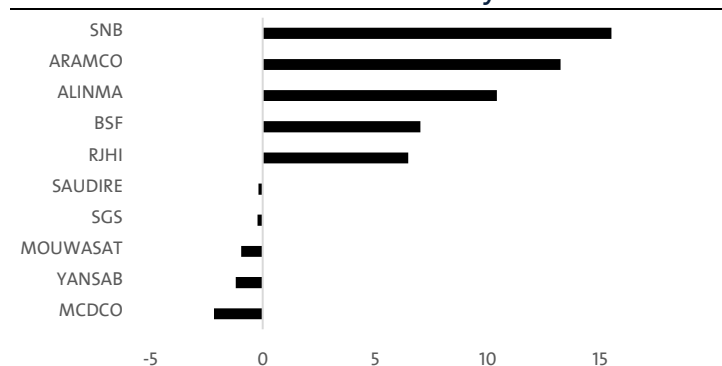
	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.97	0.07	4%	44.5
SAUDI ARAMCO	26.86	0.2	1%	15.0
SAUDI KAYAN	5.08	0.16	3%	10.4

TASI -Most Traded by Value

	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	104.9	0.4	0%	657
SAUDI ARAMCO	26.86	0.2	1%	403
SNB	42.46	0.88	2%	319

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
26-Mar	JP	BoJ Core CPI (YoY)	0	0%	2%
26-Mar	JP	Coincident Indicator (MoM) (Jan)	0	2.5%	-0.6%
26-Mar	US	Initial Jobless Claims	0	211K	205K
26-Mar	UK	Retail Sales (YoY) (Feb)	0	0%	5%
27-Mar	USD	PCE Price index (YoY) (Nov)	0	0.0%	2.8%

Source: Bloomberg, Investing.Com

Daily Market Report

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