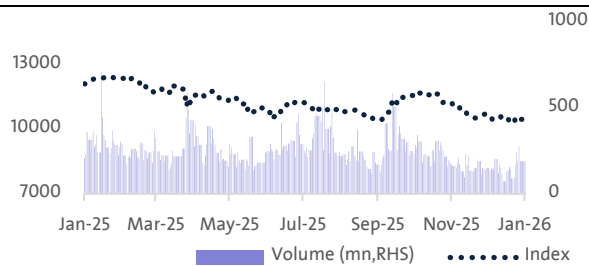


Daily Market Report

Key Indices-Return and Valuation

	01-Apr*	DoD	MTD	YTD	P/E	P/BV
TASI	11276	0.2%	0.0%	7%	15.5	1.5
NOMU	22548	-0.7%	0.0%	-4%	0.0	1.5
S&P500	6575	0.7%	0.0%	-4%	20.3	4.9
Dow Jones	46566	0.5%	0.0%	-3%	13.5	5.2
FTSE 100	10365	1.9%	0.0%	4%	13.5	2.3
EuroStoxx50	5733	2.9%	0.0%	-1%	15.5	2.3
Nikkei225	53740	5.2%	0.0%	7%	21.8	2.5
MSCI EM	1458	4.3%	0.0%	4%	11.7	2.1
SHCOMP	3949	1.5%	0.0%	-1%	16.1	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
01-Apr	166	84	19	1.9:1

Money Market Yields

%	SAIBOR			Term SOFR		
	01-Apr	Δ bps	YTD Av	01-Apr	Δ bps	YTD Av
1M	4.79	8.0	5.6	3.66	0.0	4.3
3M	4.76	-8.5	5.4	3.68	-1.0	4.3
6M	5.25	6.3	5.5	3.70	-2.9	4.2
12M	4.84	-3.3	5.2	3.73	-7.6	4.0

Commodities

	Unit	01-Apr	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	103	-7.7	135	60	-0.4
Brent	USDbbbl	101	-14.5	113	59	-0.8
Gold	USDOz	4720	3.6	5502	3003	-12.6
Silver	USDOz	75	-0.1	117	30	-24.1
Aluminum	USDton	3596	2.1	3550	2275	-5.0
Copper	USDton	12370	1.1	13952	8590	-7.9

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

KHC acquires stake in BEV from Prince Alwaleed for SAR 255M

Kingdom Holding Co. (KHC) signed an agreement to acquire a stake in Breakthrough Energy Ventures (BEV) from Prince Alwaleed bin Talal for SAR 255 million (\$68 million). In a statement to Tadawul, the company said that the estimated value of the acquired stake is \$98 million (SAR 367.5 million), based on BEV's latest audited financial statements. The transaction was executed for \$68 million at an 30% discount to the estimated value. **(Argaam)**

FMCO gets CMA nod to float 42M shares

The Capital Market Authority (CMA) approved the application of Facilities Investment Management Co. (FMCO) to offer 42 million shares to the public. The offering represents 30% of the company's total share capital of 140 million shares. The regulator said the prospectus will be published well ahead of the initial public offering (IPO). **(Argaam)**

Advanced subsidiary, SK Gas agree on share swap deal

Advanced Global Investment Co. (AGIC), fully owned by Advanced Petrochemical Co., signed final agreements with SK Gas Petrochemicals Co., an indirect subsidiary of SK Gas Co. Ltd., to execute a share-swap transaction as part of both parties' strategic plans. Under the deal, SK Gas Petrochemicals will acquire all 30% of shares held by AGIC in SK Advanced Co. Ltd.-Korea. **(Argaam)**

POS transactions hit SAR 13B last week: SAMA

The point-of-sale (POS) transactions in Saudi Arabia reached nearly SAR 13 billion in the week ended March 28, compared to about SAR 14.8 billion a week earlier. The number of POS transactions reached about 219.8 million last week, compared to nearly 223.9 million the previous week, according to data from the Saudi Central Bank (SAMA). **(Argaam)**

Global

Central banks' inflation mood puzzle: more judgment than science

The world's central bankers may be attempting the impossible: to get into the psyche of business executives, labour unions and ordinary households in real time to understand how they are navigating their finances through yet another energy shock. Policymakers are contemplating whether to jack up interest rates to combat rising inflation. But they will only pull the trigger if they think a surge in energy costs induced by the Iran war will filter into other prices, lifting inflation expectations across the entire economy. **(Reuters)**

Bank of England's Bailey says investors should not count on UK rate hikes

Bank of England Governor Andrew Bailey said on Wednesday that markets were still getting ahead of themselves by pricing in interest rate hikes by the central bank, which wants to avoid adding to the damage Britain's economy faces from the Iran war. Bailey, speaking to Reuters at the central bank's London headquarters, said BoE policymakers would need to keep a clear focus on risks to growth and jobs as well as inflation when making their next decision on rates. **(Reuters)**

Commodities

OPEC oil output shrinks to lowest since 2020: Report

OPEC oil production experienced a sharp pullback during March, reaching its lowest level since the peak of the COVID-19 pandemic in June 2020, a Reuters survey showed. The study found that the total crude oil production of member countries plummeted by 7.3 million barrels per day (bpd) from February levels, reaching 21.57 million bpd in March. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		31-Mar	01-Apr	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2381	2387	0.2%	0.0%	7.1%
Value	mn	7027	6481	-7.8%	9.9%	26.9%
Volume	mn	360	321	-10.9%	13.1%	31.1%
NOMU						
Market Cap	mn	7325	7274	-0.7%	0.0%	-4.1%
Value	mn	36.6	28.9	-21.0%	107.8%	58.7%
Volume	mn	5.9	3.0	-49.6%	44.9%	41.3%

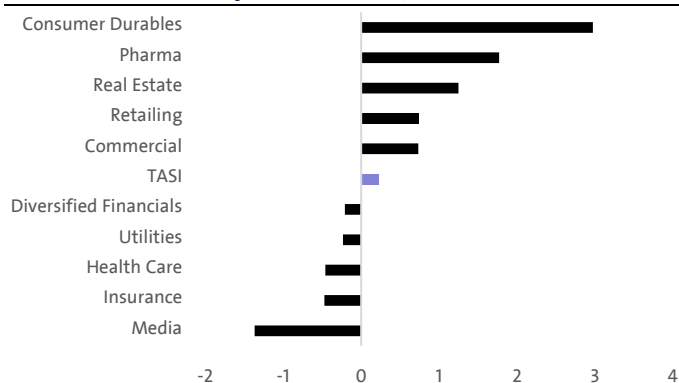
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
MESC	25.46	2.31	10%
EMAAR EC	10.71	0.97	10%
SAPTCO	11.94	1.08	10%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SAUDI CABLE	156.4	-13.6	-8%
SENAAT	36.02	-2.58	-7%
KINGDOM	9.93	-0.5	-5%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
02-Apr	MIS	Eligibility of Cash Dividend
05-April	EPCCO	Eligibility of Cash Dividend
05-April	PMI-March	Riyad Bank Composite PMI
05-April	SMASCO	Eligibility of Cash Dividend
06-April	JARIR	Riyad Bank Composite PMI

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALMODAWAT	4.13	0.64	18%
ALQEMAM	59	6.25	12%
NGDC	29.5	2.5	9%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
TIME	37.1	-15.9	-30%
ALBATTAL FACTORY	15.34	-3.96	-21%
LEAF	31.44	-3.76	-11%

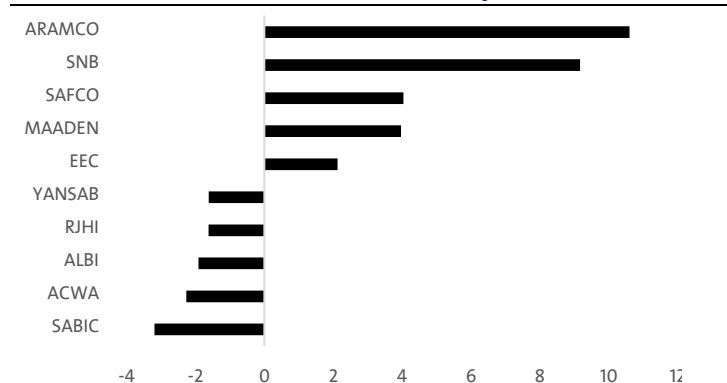
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.9	0	0%	24.3
BATIC	2.21	-0.01	0%	24.1
SAUDI ARAMCO	27.56	0.16	1%	22.6

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27.56	0.16	1%	622
SNB	42.34	0.52	1%	368
ALRAJHI	106.5	-0.1	0%	334

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
02-Apr	U.S.	President trump speak			
03-Apr	U.K.	Holiday			
03-Apr	U.S.	Holiday			
06-Apr	U.S.	ISM Non-Manufacturing Prices	Mar	68.3	66.6
07-Apr	E.U.	HCOB Eurozone Services PMI	Mar	51.1	51.9

Source: Bloomberg, Investing.Com

Daily Market Report

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