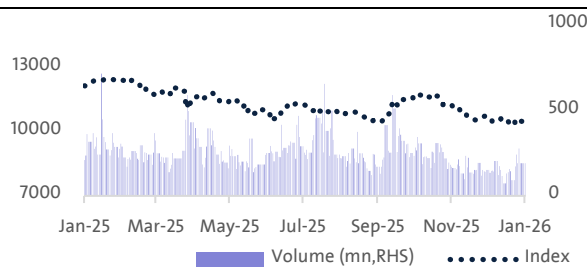


# Daily Market Report

## Key Indices-Return and Valuation

	27-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	11090	0.1%	3.6%	5%	15.3	1.5
NOMU	22719	0.7%	-0.3%	-3%	0.0	1.5
S&P500	6369	-1.7%	-7.4%	-7%	19.7	5.0
Dow Jones	45167	-1.7%	-7.8%	-6%	13.0	5.3
FTSE 100	9967	0.0%	-8.6%	0%	13.0	2.2
EuroStoxx50	5506	-1.1%	-10.0%	-5%	14.8	2.3
Nikkei225	53373	-0.4%	-9.3%	6%	22.3	2.6
MSCI EM	1437	-0.8%	-10.0%	2%	12.1	2.2
SHCOMP	3914	0.63%	-6.0%	-1%	15.6	1.5

## TASI- Index and Volume Trends



## Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
26-Mar	138	115	13	1.2:1

## Money Market Yields

%	SAIBOR			Term SOFR		
	26-Mar	Δ bps	YTD Av	27-Mar	Δ bps	YTD Av
1M	4.71	2.9	5.6	3.67	-0.3	4.3
3M	4.85	-8.4	5.4	3.70	-1.0	4.3
6M	5.18	13.2	5.5	3.73	-1.5	4.2
12M	4.87	-3.2	5.2	3.79	-2.3	4.0

## Commodities

	Unit	27-Mar	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	109	4.2	135	60	-0.1
Brent	USDbbbl	113	4.2	112	59	-0.4
Gold	USDOz	4430	-0.3	5502	3003	-12.3
Silver	USDOz	70	2.5	117	30	-23.7
Aluminum	USDton	3357	0.9	3550	2275	-4.8
Copper	USDton	12120	-0.6	13952	8590	-7.8

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

### East-West pipeline pumps at full 7M bpd capacity: Report

Saudi Arabia's East-West pipeline is currently operating at its full capacity of 7 million barrels per day, Bloomberg reported, citing a source. **(Argaam)**

### SABIC AN shareholders OK Ibn Al-Baytar merger

Shareholders of SABIC Agri-Nutrients Co. (SABIC AN) approved the merger with National Chemical Fertilizers Co. (Ibn Al-Baytar) and the dissolution of Ibn Al-Baytar upon completion of the transaction. **(Argaam)**

### Saudi CMA allows public offering of financing investment funds and their listing on stock markets

The Saudi Capital Market Authority (CMA) has approved a regulatory framework to develop financing investment funds by introducing amendments to their governing instructions. This is aimed at strengthening their role as financing channels in the Saudi capital market and enabling additional products that support economic growth and meet investor needs. **(Argaam)**

### PIF to unveil new strategy within weeks Al-Rumayyan says

Yasir Al-Rumayyan, Governor of the Public Investment Fund (PIF), said Saudi Arabia's economy remains "strong, stable and resilient," as the Fund prepares to unveil a new five-year strategy within weeks. Speaking at the FII PRIORITY Miami 2026, Al-Rumayyan outlined a strategic shift in the sovereign wealth fund's approach, moving from predominantly self-funded investments toward a broader model that invites both domestic and international partners.. **(Zawya)**

### \$1B hospitality platform to develop 50 hotels in Saudi Arabia

A US-based Patel Family Office and Saudi industrial group Abdulhadi Al Qahtani & Sons (AHQ) launched a \$1 billion hospitality platform to develop 50 hotels across Saudi Arabia. The platform aims to support business tourism and boost economic diversification in the Kingdom, according to the Saudi Press Agency. **(Argaam)**

### Saudi SAMA's reserve assets surge 5.3% to \$461bln by end of 2025

The Saudi Central Bank's (SAMA) reserves have recorded a remarkable increase of SR86.3 billion at the end of 2025, reaching SR1.73 trillion, compared to SR1.64 trillion during the same period in 2024. **(Reuters)**

## Global

### US consumer sentiment slides to three-month low as war fans inflation fears

U.S. consumer sentiment fell more than expected in March, touching a three-month low, as war in the Middle East stoked inflation worries and cast a shadow over the economic outlook. The decline, reported by the University of Michigan's Surveys of Consumers on Friday, occurred across political party affiliation and age groups, with large decreases among middle- and higher-income consumers as well as those owning stocks. **(Reuters)**

## Commodities

### Gold rebounds at close, posts fourth weekly loss

Gold prices closed higher on Friday as investors bought recent dips, though the metal still posted a fourth consecutive weekly decline. Gold futures climbed 2.65%, or \$116.20, to \$4,492.50 per ounce, but were down 1.8% on the week. **(Argaam)**

### Oil closes above \$112

Oil prices settled higher on Friday, posting weekly gains as shipping disruptions in the Strait of Hormuz persisted and uncertainty over the Middle East conflict remained elevated. Brent crude futures for May delivery climbed 4.22%, or \$4.56, to \$112.57 per barrel, up 0.34% for the week. **(Argaam)**

# Daily Market Report

## TASI & NOMU- Key Statistics

		25-Mar	26-Mar	Δ%		
<b>TASI</b>	SAR			<b>DoD</b>	<b>MTD*</b>	<b>YTD*</b>
Market Cap	bn	2348	2348	0.0%	-1.2%	-3.8%
Value	mn	5335	5335	0.0%	-15.3%	13.0%
Volume	mn	257	257	0.0%	-0.3%	8.7%
<b>NOMU</b>						
Market Cap	mn	7329	7329	0.0%	0.5%	-3.4%
Value	mn	17.8	17.8	0.0%	22.0%	-6.8%
Volume	mn	2.5	2.5	0.0%	23.7%	5.6%

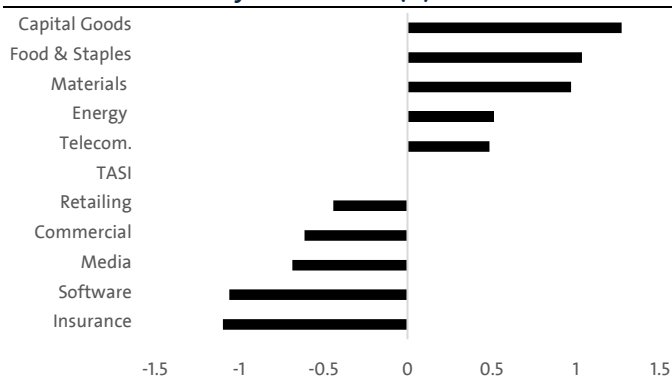
\*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SALEH ALRASHED	55.55	5.05	10%
YANSAB	34.36	2.32	7%
KINGDOM	9.89	0.64	7%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
AMAK	87.8	-2.7	-3%
RASAN	134.1	-3.5	-3%
ARABIAN DRILLING	77.5	-2	-3%

Source: Tadawul

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



Source: Bloomberg

## TASI Market Calendar

Date	Stock/Data release	Event
29-Mar	Bidaya	Listing Date
29-Mar	EIV	Cash Dividend Distribution
30-Mar	SABIC Agri	Cash Dividend Distribution
29-Mar	SAL	General Meeting
31-Mar	SAMA	Monthly Bulletin

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%

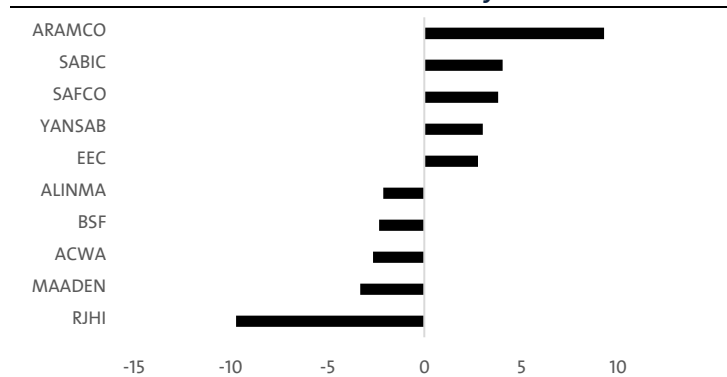
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.96	-0	-1%	26.6
SAUDI ARAMCO	27	0.14	1%	15.7
APC	5.43	0.21	4%	14.4

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27	0.14	1%	423
SNB	42.5	0.04	0%	284
ALRAJHI	104.3	-0.6	-1%	277

Source: Tadawul

## TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

## Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
30-Mar	EU	Consumer Confidence	Mar	-16.3	-12.2
30-Mar	EU	Consumer Inflation Expect	Mar	0	25.8
31-Mar	JP	Tokyo CPI (YoY)	Mar	0.0	1.60%
31-Mar	CN	Chinese Composite PMI	Mar	0	49.5
31-Mar	UK	GDP (YoY)	4Q	1.0%	1.3%

Source: Bloomberg, Investing.Com

## Daily Market Report

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