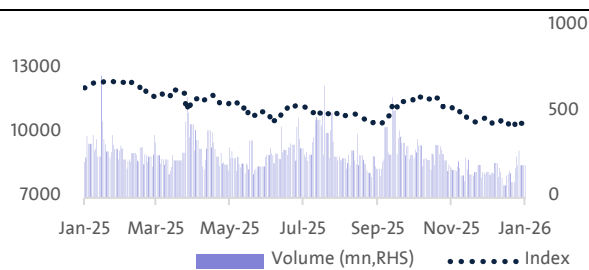


# Daily Market Report

## Key Indices-Return and Valuation

	29-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	11076	-0.1%	3.4%	5%	15.2	1.5
NOMU	22752	0.1%	-0.2%	-3%	0.0	1.5
S&P500	6369	0.0%	-7.4%	-7%	19.7	5.0
Dow Jones	45167	0.0%	-7.8%	-6%	13.0	5.2
FTSE 100	9967	0.0%	-8.6%	0%	13.0	2.2
EuroStoxx50	5506	0.0%	-10.0%	-5%	14.9	2.3
Nikkei225	53373	0.0%	-9.3%	6%	22.3	2.6
MSCI EM	1437	0.0%	-10.0%	2%	12.0	2.2
SHCOMP	3914	0.00%	-6.0%	-1%	15.6	1.5

## TASI- Index and Volume Trends



## Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
29-Mar	156	106	9	1.4:1

## Money Market Yields

%	SAIBOR			Term SOFR		
	29-Mar	Δ bps	YTD Av	27-Mar	Δ bps	YTD Av
1M	4.71	2.8	5.6	3.67	-0.3	4.3
3M	4.85	-6.5	5.4	3.70	-1.0	4.3
6M	5.18	7.6	5.5	3.73	-1.5	4.2
12M	4.87	-2.6	5.2	3.79	-2.3	4.0

## Commodities

	Unit	30-Mar	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USD bbl	108	-1.1	135	60	-0.3
Brent	USD bbl	115	2.4	113	59	-0.6
Gold	USDOz	4430	0.0	5502	3003	-12.5
Silver	USDOz	71	1.3	117	30	-23.9
Aluminum	USD ton	3357	0.0	3550	2275	-4.9
Copper	USD ton	12120	0.0	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

### Saudi Steel Pipe signs SAR 127M deal with Aramco

Saudi Steel Pipe Co. (SSP) signed a contract worth approximately SAR 127 million for the supply of oil and gas steel pipes to Saudi Aramco, according to a Tadawul statement. The 12-month contract was awarded and signed today, March 29, the company said. This order is expected to be reflected on H1 2027 financials, SSP said, adding that no related parties were involved. **(Argaam)**

### SMASCO CEO sees continued positive performance in Q1 2026

Saudi Manpower Solutions Co.'s (SMASCO) positive performance is expected to continue during the first quarter of 2026, as it coincided with the holy month of Ramadan, which saw increased demand for labor services, especially in the individuals segment, CEO Abdullah Altimyat told Argaam in an interview. **(Argaam)**

### Foreign investors net buyers of SAR 1.1B stocks on Tadawul last week

Foreign individual investors were net buyers of nearly SAR 1.1 billion worth of stocks on Tadawul in the week ended March 26 (only three sessions due to Eid Al-Fitr Holiday), according to recent data issued by Tadawul. Meanwhile, foreign institutions accounted for 52.1% of total buys versus 46.6% of sells. **(Argaam)**

### Molan Steel signs settlement agreement with Yara International

Molan Steel Co. signed on March 29 a final and comprehensive settlement agreement with Yara International Ltd. This resulted in the full resolution of the dispute between the two parties related to the subsidiary commercial registration in the name of Mayar International for Industry. This is in addition to the settlement of all related claims and procedures, while maintaining the agreement in force and agreeing on a new payment schedule for the remaining amount. **(Zawya)**

### Saudi Arabia extends exemption period for container fee at Dammam and Jubail ports

The Saudi Ports Authority (Mawani) announced the launch of an initiative to extend the exemption period for incoming empty containers through King Abdulaziz Port in Dammam and Jubail Commercial Port. This is within the framework of supporting the competitiveness of Saudi ports and enhancing the efficiency of logistics operations, in a way that contributes to supporting the movement of national exports. **(Argaam)**

## Global

### Japan steps up yen intervention threats, signals rate-hike chance

Japan stepped up yen intervention threats and signalled that further falls in the currency could justify a near-term interest rate hike, as policymakers grow increasingly concerned about inflationary pressures from the Middle East war. In the strongest warning yet of yen-buying intervention, Japan's top currency diplomat Atsushi Mimura said on Monday authorities may need to take "decisive" steps if speculative moves persist in the currency market. **(Reuters)**

## Commodities

### Gold firms on softer dollar, but dimming Fed rate-cut hopes cap rise

Gold rose on Monday as the dollar softened, but gains were capped by a surge in energy prices that fuelled inflation worries and further dimmed expectations for U.S. Federal Reserve interest rate cuts this year. Spot gold rose 0.8% to \$4,528.74 per ounce as of 0627 GMT after falling about 1% earlier in the session. U.S. gold futures for April delivery gained 0.7% to \$4,556.70. **(Reuters)**

### Trump reverses course on Cuban oil blockade, allows Russian tanker to pass

U.S. President Donald Trump signalled he was reversing course on blocking oil shipments to Cuba on Sunday, saying he had "no problem" with any country sending in crude as a Russian tanker neared a Cuban port with a badly needed shipment. **(Reuters)**

Please refer to page III for important disclosures

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## Daily Market Report

## TASI &amp; NOMU- Key Statistics

		26-Mar	29-Mar	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2348	2375	1.2%	-0.1%	-2.7%
Value	mn	5335	5223	-2.1%	-17.0%	10.6%
Volume	mn	257	196	-23.6%	-23.8%	-16.9%
NOMU						
Market Cap	mn	7329	7175	-2.1%	-1.6%	-5.4%
Value	mn	17.8	16.9	-5.3%	15.6%	-11.6%
Volume	mn	2.5	2.5	1.7%	25.8%	7.3%

\*Average for the period, Source: Argaam

## TASI-Top Gainers

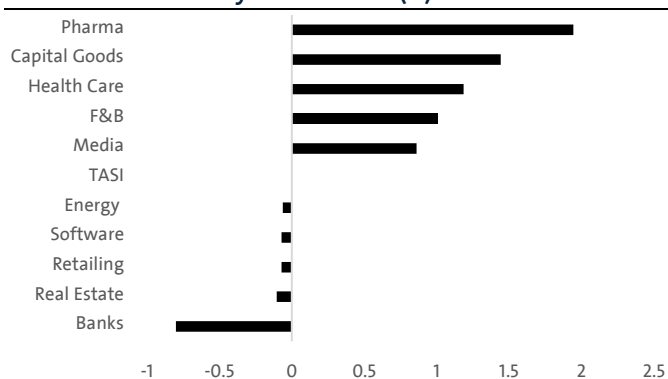
	Last Price	Change	
	SAR/sh	SAR	%
SALEH ALRASHED	61.1	5.55	10%
BAWAN	50.9	3.58	8%
ANAAM HOLDING	10.89	0.65	6%

## TASI-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
ALKHALEEJ TRNG	16.69	-0.8	-5%
ALSAGR INSURANCE	9.26	-0.3	-3%
SARCO	48.5	-1.4	-3%

Source: Tadawul

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



Source: Bloomberg

## TASI Market Calendar

Date	Stock/Data release	Event
30-Mar	SABIC Agri	Cash Dividend Distribution
30-Mar	SAL	General Assembly
31-Mar	SAMA	Monthly Bulletin
30-Mar	NADEC	EOGM
31-Mar	Tawuniya	General Assembly

## NOMU-Top Gainers

	Last Price	Change	
	SAR/sh	SAR	%
DAR ALMARKABAH	1.4	0.21	18%
ALFAKHERA	5.92	0.74	14%
LEAF	36	4.48	14%

## NOMU-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
ALMODAWAT	3.6	-0.5	-12%
MAYAR	1.25	-0.1	-9%
ITMAM	14.6	-1.4	-9%

Source: Tadawul

## TASI -Most Traded by Volume

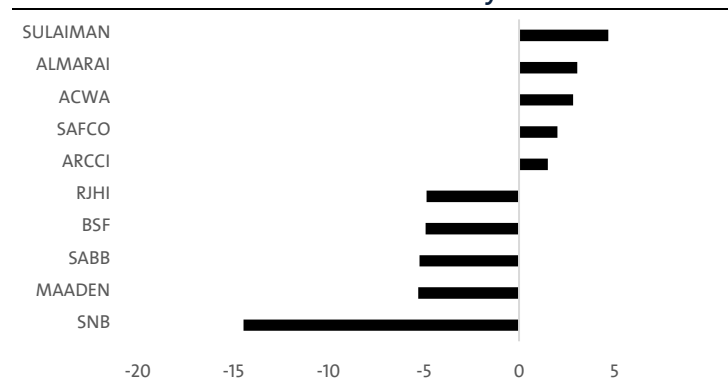
	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.94	-0	-1%	20.8
BATIC	2.07	0.07	4%	14.5
APC	5.68	0.25	5%	10.6

## TASI -Most Traded by Value

	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.98	-0	0%	252
ALRAJHI	104	-0.3	0%	170
SABIC AGRI-NUTRIENTS	142.8	1.8	1%	151

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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## Daily Market Report

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