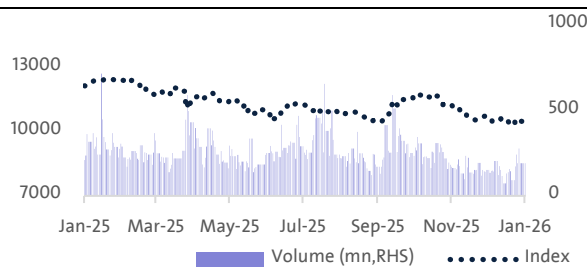


Daily Market Report

Key Indices-Return and Valuation

	30-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	11167	0.8%	4.3%	6%	15.3	1.5
NOMU	22883	0.6%	0.4%	-3%	0.0	1.5
S&P500	6344	-0.4%	-7.8%	-7%	19.6	5.0
Dow Jones	45216	0.1%	-7.7%	-6%	13.2	5.2
FTSE 100	10128	1.6%	-7.2%	2%	13.2	2.2
EuroStoxx50	5542	0.7%	-9.7%	-4%	15.0	2.3
Nikkei225	51886	-2.8%	-11%	3%	21.7	2.6
MSCI EM	1412	-1.7%	-12%	0%	12.0	2.1
SHCOMP	3923	0.24%	-5.8%	-1%	15.9	1.5

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
30-Mar	156	103	7	1.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	30-Mar	Δ bps	YTD Av	28-Mar	Δ bps	YTD Av
1M	4.69	-2.1	5.6	3.67	-0.5	4.3
3M	4.86	1.3	5.4	3.70	-0.1	4.3
6M	5.16	-2.3	5.5	3.74	1.1	4.2
12M	4.78	-8.6	5.2	3.83	3.8	4.0

Commodities

	Unit	30-Mar	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbl	103	-6.0	135	60	-0.3
Brent	USDbbl	113	0.2	113	59	-0.6
Gold	USDOz	4528	2.2	5502	3003	-12.5
Silver	USDOz	70	0.5	117	30	-23.9
Aluminum	USDton	3448	2.7	3550	2275	-4.9
Copper	USDton	12225	0.9	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

Unemployment rate among Saudis hits 7.2% in Q4 2025: GASTAT

The unemployment rate among Saudis declined to 7.2% in Q4 2025, from 7.5% in Q3 2025, according to the Labor Force Survey issued by the General Authority for Statistics (GASTAT). Unemployment among Saudi males rose to 5.6% -- the highest since Q3 2021-- while the rate for females stood at 10.3%. Joblessness rate among non-Saudis reached 1.7%. **(Argaam)**

ADES CEO: Rig suspensions impact temporary; offshore drilling still tight

Mohamed Farouk, CEO at ADES Holding Co., said fewer than 10 of the group's offshore rigs in the GCC were recently suspended due to regional tensions, describing the impact as short-term based on current visibility. He told Argaam ADES remains focused on safeguarding personnel and assets, while maintaining close coordination with clients and stakeholders to ensure operational readiness. Farouk said the group's fleet (123 rigs across 20 countries) and business model help cushion short-term disruptions. **(Argaam)**

Tadawul announces Q1 2026 indices maintenance

The Saudi Exchange (Tadawul) is implementing an update to free float shares for all listed issuers on the Main Market (TASI) and the Nomu-Parallel Market, effective as of trading start on April 5, 2026. Nofoth Food Products Co ,Alwasail Industrial Co. and Saleh Abdulaziz Al Rashed and Sons Co, will be added in TASI and respective sector indices while and Khaled Dhafer and Brothers for Logistics Services Co. will be added in Parallel Market Capped Index (NomuC) **(Argaam)**

Saudi Arabia 4Q Net Foreign Direct Investment Rises to SAR48.4b

Saudi Arabia 4Q Net Foreign Direct Investment Rises to SAR48.4b in 4Q from revised SAR26.6b in 3Q, according to the General Authority for analysis and commentary. The Inbound foreign direct investment rose to SAR50.6b from revised SAR29.9b. **(Bloomberg)**

Saudi's Najran Cement secures \$13mln loan to fund power grid network

Najran Cement Company has secured a Shariah-compliant loan from Saudi National Bank (SNB) to fund its electrical grid connection project. **(Zawya)**

Global

UK economy limped into the end of last year before Iran war

Britain's economy barely grew at the end of 2025, official data confirmed on Tuesday, adding to the challenge for the government to keep growth on track in 2026 with the Iran war likely to hit demand and push up inflation. Gross domestic product increased by 0.1% in the October-to-December period, the Office for National Statistics said. **(Reuters)**

Japan brands yen falls as 'speculative' as Iran war ignites sell-off

Japan on Tuesday labelled recent yen falls as speculative for the first time since the Middle East war began, shifting its focus back to currency short-sellers as policymakers braced for a triple market sell-off driven by fresh inflationary concerns. **(Reuters)**

Commodities

Oil down 1% after report says Trump open to ending campaign against Iran

Battered financial markets enter the second quarter significantly exposed to war headlines, a backdrop that could prompt a bigger retreat for equity markets while a hefty selloff in bonds could tempt buyers back. Even if a resolution to the conflict boosts near-term sentiment, damage inflicted on Middle East energy infrastructure and higher for longer oil prices will still hurt economic growth and drive up inflation, investors expect. **(Reuters)**

Please refer to page III for important disclosures

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Daily Market Report

TASI & NOMU- Key Statistics

		29-Mar	30-Mar	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2345	2364	0.8%	-0.5%	-3.1%
Value	mn	3563	5916	66.1%	-6.0%	25.3%
Volume	mn	196	292	48.9%	13.4%	23.7%
NOMU						
Market Cap	mn	7340	7382	0.6%	1.3%	-2.7%
Value	mn	20.1	24.6	21.9%	68.2%	28.6%
Volume	mn	2.5	3.3	32.0%	66.0%	41.7%

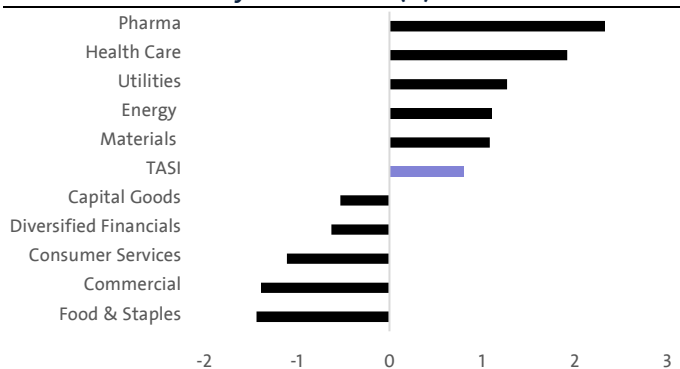
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
SALEH ALRASHED	67.2	6.1	10%
SAPTCO	9.88	0.89	10%
RAOOM	71.75	5.15	8%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
BAWAN	46.84	-4.1	-8%
MAHARAH	5.81	-0.3	-4%
ALKHALEEJ TRNG	16.06	-0.6	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
31-Mar	SAMA	Monthly Bulletin
31-Mar	NADEC	EOGM
31-Mar	SMASCO	Eligibility of Cash Dividend
05-April	EPCCO	Eligibility of Cash Dividend
05-April	PMI-March	Riyad Bank Composite PMI

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
BALADY	133.9	18.4	16%
MUFEEED	40	2.98	8%
HAWYIA	14	1	8%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALASHGHAL ALMOYSRA	16.3	-2.8	-14%
ALMODAWAT	3.18	-0.4	-12%
NAAS PETROL	33.32	-3.7	###

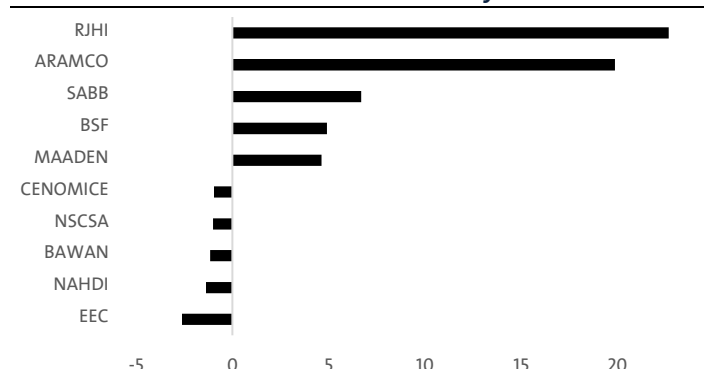
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.93	-0	-1%	28.2
SAUDI ARAMCO	27.28	0.3	1%	19.8
CHEMICAL	8	0.48	6%	16.6

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	27.28	0.3	1%	539
ALRAJHI	105.4	1.4	1%	527
SNB	41.78	0.1	0%	237

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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%
1-Apr	EU	CPI (YoY)	Mar	0.0	1.90%
1-Apr	EU	HCOB Eurozone Manufacturing PMI	Mar	51.4	50.8

Source: Bloomberg, Investing.Com

Daily Market Report

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