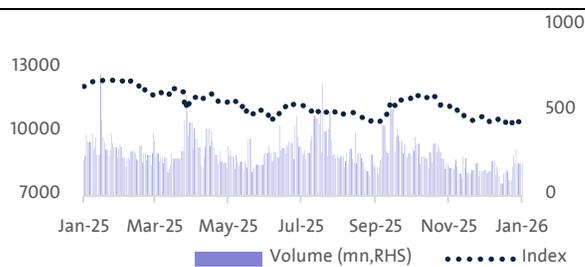


Daily Market Report

Key Indices-Return and Valuation

	27-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	10709	-1.28%	-5.9%	2%	17.3	1.6
NOMU	22793	-0.54%	-4.7%	-3%	0.0	1.6
S&P500	6909	-0.54%	-0.4%	1%	21.9	5.4
Dow Jones	49499	0.03%	1.2%	3%	15.8	5.6
FTSE 100	10847	0.37%	6.1%	9%	15.8	2.5
EuroStoxx50	6162	-0.19%	3.6%	6%	16.9	2.5
Nikkei225	58753	0.29%	10.2%	17%	24.5	2.8
MSCI EM	1619	0.29%	6.0%	15%	18.0	2.5
SHCOMP	4147	-0.01%	0.7%	4%	16.0	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
26-Feb	73	187	8	0.4:1

Money Market Yields

%	SAIBOR			Term SOFR		
	26-Feb	Δ bps	YTD Av	27-Feb	Δ bps	YTD Av
1M	4.68	5.1	5.6	3.67	-0.5	4.3
3M	4.88	-7.2	5.4	3.67	-0.5	4.3
6M	5.10	-12.0	5.5	3.62	-0.5	4.2
12M	4.80	2.6	5.2	3.47	0.5	4.0

Commodities

	Unit	27-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	71	2.5	80	60	3.2
Brent	USDbbbl	72	2.4	79	59	2.5
Gold	USDOz	5174	0.0	5502	2861	-8.8
Silver	USDOz	94	6.2	117	30	-18.1
Aluminum	USDton	3128	-0.5	3252	2275	-2.9
Copper	USDton	13484	1.5	13952	8590	-5.8

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

Almunajem to acquire rights of two trademarks

Almunajem Foods Co. announced that it has reached a preliminary agreement to acquire the intellectual property rights of the two international trademarks "Doux" and "Supreme" in Saudi Arabia, the GCC, and Yemen, according to a statement to Tadawul. **(Argaam)**

Saudi German Health sees revenue growth in 2026, margins to improve slightly: CEO

Middle East Healthcare Co.'s (Saudi German Health) management expects sales to continue growing through 2026, alongside a gradual improvement in profit margins, despite anticipating a relative slowdown in Q1 2026 due to seasonal factors, CEO Nizar Bahabri told Argaam. **(Argaam)**

Sulaiman Al Habib opens new medical centre in Riyadh

Dr. Sulaiman Al Habib Medical Services Group opened a new medical centre in the King Abdullah Financial District (KAFD), Riyadh, as part of its expansion strategy in outpatient services. According to Al Riyadh newspaper, the centre includes specialised departments and clinics and forms part of the group's geographic expansion plan to improve patient access to healthcare services. **(Argaam)**

Cenomi Centers announces that it has received a notice of lawsuits

Cenomi Centers announces that it has received a notice of lawsuits filed against it by the owner of Mall of Dhahran, claiming "fair rental value," "property rent," and "recovery of revenues from the property- Mall of Dhahran, amounting to SAR164.5mn **(Company Notice)**

Arabian Drilling Announces Successful Start Of Operations Of Recalled Rigs

Arabian Drilling announced today the successful reactivation of one offshore and one land rigs, which were previously recalled during the fourth quarter of 2025. Another land rig recalled in the fourth quarter is scheduled to resume operations tomorrow on 2 March. **(Company Notice)**

Global

US producer prices increase strongly in January

U.S. producer prices accelerated in January, with the cost of goods outside the volatile food and energy category increasing by the most in more than three and a half years as businesses passed on import tariffs and raised prices at the start of 2026. **(Reuters)**

Core inflation in Japan's capital slows below BOJ's 2% target in test for policy

Annual core inflation in Tokyo slowed in February, running below the Bank of Japan's 2% target for the first time in 16 months, data showed on Friday, potentially heightening friction between the central bank and the government on the future path of rate hikes. **(Reuters)**

Commodities

Oil and gas majors and traders suspend shipments via Hormuz, sources say

Several tanker owners, oil majors and trading houses have suspended crude oil, fuel and liquefied natural gas shipments via the Strait of Hormuz after the U.S. and Israel attacked Iran and Tehran said it had closed navigation, trading sources said on Saturday. **(Reuters)**

OPEC+ may consider larger oil output boost, sources say, as Saudi, UAE up exports

OPEC+ may consider a larger-than-planned output increase of 411,000 barrels per day at a meeting on Sunday, two sources close to the talks said, after Saudi Arabia and the UAE raised exports in anticipation of possible disruption to oil markets from U.S.-Israeli strikes on Iran carried out on Saturday. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		25-Feb	26-Feb	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2296	2267	-1.3%	-4.6%	-7.1%
Value	mn	3775	6590	74.5%	-18.9%	39.6%
Volume	mn	164	264	61.1%	-33.3%	11.7%
NOMU						
Market Cap	mn	7393	7353	-0.5%	-4.2%	-3.1%
Value	mn	17	13	-23.9%	-2.6%	-32.3%
Volume	mn	2	2	-1.6%	5.4%	-21.2%

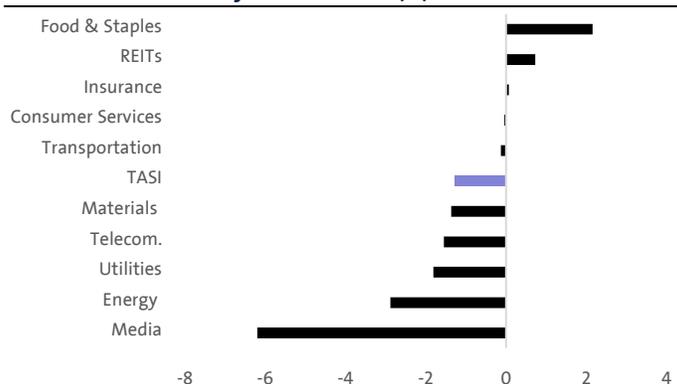
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALRAJHI TAKAFUL	74.5	6.75	10%
JAZADCO	8.33	0.75	10%
GIG	23	1.6	7%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SRMG	81.85	-8.95	-10%
CITY CEMENT	11.5	-0.67	-6%
GACO	13.15	-0.58	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
01-Mar	ARABIAN DRILLING	Financial result
01-Mar	JAMJOOM PHARMA	Ex-dividends date
02-Mar	KESAY CLINICS	Surplus refund date
02-Mar	ALDREES	Ex-dividends date
03-Mar	NAQI	General Assembly

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
PAN GULF	20.8	1.77	9%
NAF	35.94	2.62	8%
MAYAR	1.54	0.09	6%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALQEMAM	38.8	-8.2	-17%
ALHASOOB	31.22	-3.38	-10%
SAHAT ALMAJD	6.4	-0.69	-10%

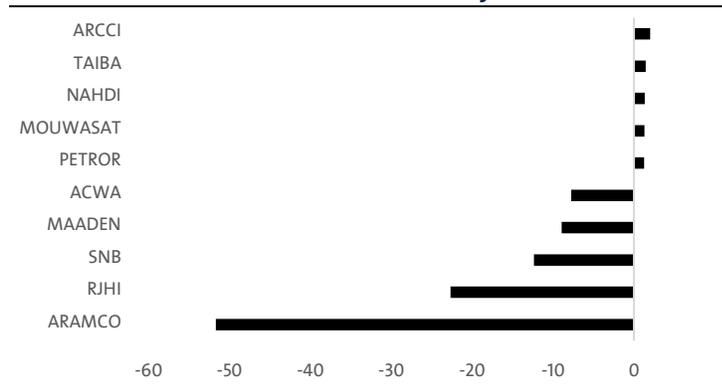
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.05	-0.01	0%	27.7
SIPCHEM	13.87	-0.17	-1%	27.2
SAUDI ARAMCO	24.96	-0.78	-3%	16.5

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	101	-1.4	-1%	476
SAUDI ARAMCO	24.96	-0.78	-3%	414
SNB	41.68	-0.7	-2%	399

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
03-Mar	E.U.	Consumer price index	Feb	1.9%	
04-Mar	C.Y.	Manufacturing PMI	Feb	50.1	50.1
05-Mar	U.S.	Initial job claims	Feb	3.3%	
06-Mar	U.S.	Average hourly earnings	Feb	0.3%	0.1%
10-Mar	U.S.	Existing Home Sales	Feb	4.16M	4.27M

Source: Bloomberg, Investing.Com

Daily Market Report

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