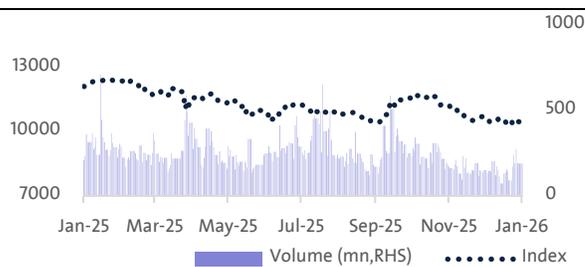


# Daily Market Report

## Key Indices-Return and Valuation

	02-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	10489	0.13%	-2.1%	-1%	16.8	1.6
NOMU	22533	-0.29%	-1.1%	-4%	0.0	1.6
S&P500	6882	0.04%	0.0%	1%	21.9	5.4
Dow Jones	48905	-0.15%	-0.1%	2%	15.7	5.6
FTSE 100	10780	-1.20%	-1.2%	9%	15.7	2.5
EuroStoxx50	5987	-2.47%	-2.5%	3%	16.4	2.5
Nikkei225	58057	-1.35%	-1.3%	15%	23.9	2.9
MSCI EM	1586	-1.55%	-1.5%	13%	17.9	2.5
SHCOMP	4183	0.47%	0.5%	5%	16.1	1.6

## TASI- Index and Volume Trends



## Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
02-Mar	74	189	5	0.4:1

## Money Market Yields

%	SAIBOR			Term SOFR		
	02-Mar	Δ bps	YTD Av	01-Mar	Δ bps	YTD Av
1M	4.70	2.5	5.6	3.67	-0.5	4.3
3M	4.83	-5.7	5.4	3.67	-0.5	4.3
6M	5.28	17.5	5.5	3.62	-0.5	4.2
12M	4.88	7.6	5.2	3.47	0.5	4.0

## Commodities

	02-Mar		Δ	52-week		YTD Av
	Unit	USD		Hi	low	
Arab Light	USDbbbl	79	10.2	80	60	3.3
Brent	USDbbbl	78	7.3	79	59	2.5
Gold	USDOz	5390	4.2	5502	2861	-9.0
Silver	USDOz	89	-4.7	117	30	-18.5
Aluminum	USDton	3184	1.8	3252	2275	-3.0
Copper	USDton	13290	-1.4	13952	8590	-5.9

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 PMI falls to 56.1 points in February

The seasonally adjusted Riyadh Bank Saudi Arabia Purchasing Managers' Index (PMI), formerly S&P Global Saudi Arabia PMI, dropped to 56.1 points in February 2026, maintain its downward trajectory since reaching its highest levels in more than 10 years in October 2025. **(Argaam)**

### MAWANI pens SAR 250M contract to build logistics zone at Jeddah Islamic Port

Saudi Ports Authority (MAWANI) signed a contract with Sultan Logistics Co., a specialized national company, to establish a logistics zone at Jeddah Islamic Port in the Khomrah area. The project carries an investment value of SAR 250 million and will span 200,000 square meters. The initiative aims to boost operational efficiency and enhance the logistics services provided to port beneficiaries. **(Argaam)**

### FIPCO inks SAR 86.8M woven bags supply deal with SABIC for 3 years

Filing and Packing Materials Manufacturing Co. (FIPCO) signed a framework agreement with Saudi Basic Industries Corp. (SABIC) to manufacture and supply large woven plastic bags for three years, with an option to extend for an additional two years. The agreement's estimated value is SAR 86.75 million (excluding VAT). **(Argaam)**

### Consumer spending surges 11% to SAR 141.3B in January

Consumer spending in Saudi Arabia grew by 11% to SAR 141.3 billion in January 2026 from nearly SAR 126.9 billion a year earlier, marking the highest level in 10 months. Consumer spending represents total cash withdrawals, point-of-sale (POS) transactions, and e-commerce via Mada cards. **(Argaam)**

### Kesay Clinics decides not to proceed with Nomu IPO

Kesay Clinics Co. decided not to proceed with its planned initial public offering (IPO) on the Nomu-Parallel Market (Nomu) after consulting with Estidamah Capital Co., its financial advisor. **(Argaam)**

## Global

### Fed races to adapt to AI promises and pitfalls for jobs, inflation

U.S. Federal Reserve officials who have largely accepted that artificial intelligence will lead to dramatic shifts in the economy are now struggling to understand the pace and extent of what's to come, with a divide emerging over its potential to impact the labor market and prices. **(Reuters)**

### US manufacturing activity steady, factory gate inflation surges

U.S. manufacturing activity grew steadily in February, but a gauge of prices at the factory gate raced to a near 3-1/2-year high amid tariffs, highlighting upside risks to inflation even before a U.S.-led attack on Iran sent oil prices rocketing. **(Reuters)**

## Commodities

### Brent crude jumps 3% to \$80

Oil prices remained on upward trajectory for the third consecutive session today, March 3, as the US-Israel conflict with Iran intensified, reinforcing concerns about supply disruptions from the Middle East region. Brent crude was trading up 2.91% at \$80.02 a barrel, at 09:00 am Makkah time, after rising 7% in the previous session. West Texas Intermediate (WTI) jumped 2.27% to \$72.85 a barrel. **(Argaam)**

### Europe's skimpy gas storage under scrutiny as Qatar halts LNG flows

The historically low levels of gas inventories across Europe could quickly become a major liability for utilities and industry across the region following the halting of LNG exports by world's third-largest producer Qatar. **(Reuters)**

## Daily Market Report

## TASI &amp; NOMU- Key Statistics

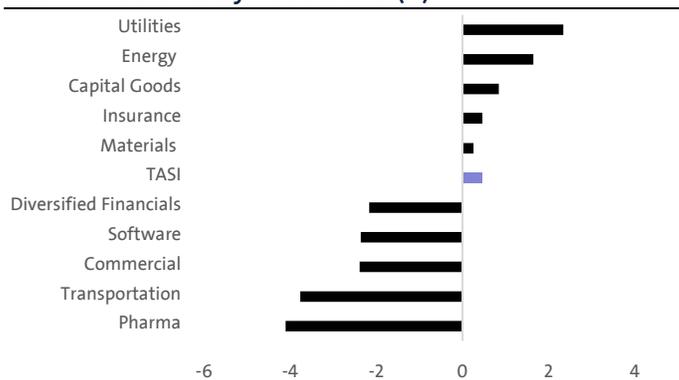
		01-Mar	02-Mar	Δ%		
<b>TASI</b>	SAR			<b>DoD</b>	<b>MTD*</b>	<b>YTD*</b>
Market Cap	bn	2218	2220	0.1%	-6.6%	-9.0%
Value	mn	5371	7222	34.5%	14.7%	52.9%
Volume	mn	257	258	0.6%	0.3%	9.4%
<b>NOMU</b>						
Market Cap	mn	7353	7269	-1.1%	-1.1%	-4.2%
Value	mn	16	13	-16.9%	-9.3%	-30.6%
Volume	mn	2	2	31.5%	13.6%	-3.0%

\*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
THIMAR	35.48	1.88	6%
ALRAJHI TAKAFUL	81.25	4.25	6%
BAHRI	30.72	1.52	5%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SHL	14.6	-1	-6%
FLYNAS	51	-3.45	-6%
CENOMI CENTERS	16.36	-1.06	-6%

Source: Tadawul

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



Source: Bloomberg

## TASI Market Calendar

Date	Stock/Data release	Event
03-Mar	NAQI	General Assembly
04-Mar	ELM	Ex-dividends date
04-Mar	SABIC	Conference
05-Mar	BUPA ARABIA	General Assembly
05-Mar	SACO	Conference

Source: Argaam, GSTAT

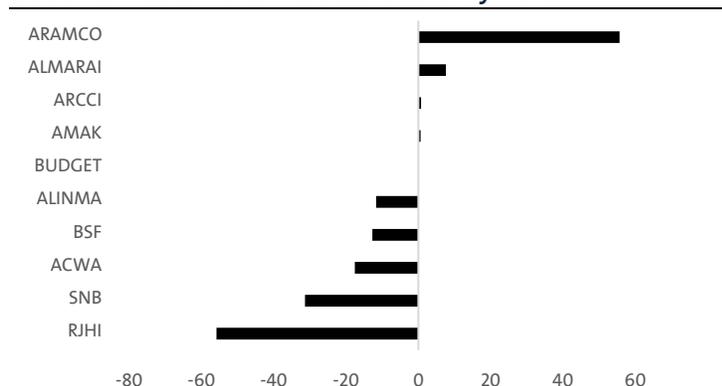
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ACADEMY OF LEARNING	6.99	0.59	9%
ALFAKHERA	5.35	0.35	7%
ALJOUF WATER	2.28	0.14	7%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
ALKUZAMA	60.35	-6.6	-10%
KNOWLEDGE TOWER	9.95	-0.89	-8%
RAWASI	3.07	-0.23	-7%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.95	-0.01	-1%	35.5
SAUDI ARAMCO	26.22	0.42	2%	28.4
ALRAJHI	97.1	-0.45	0%	17.2
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	97.1	-0.45	0%	1669
SAUDI ARAMCO	26.22	0.42	2%	744
SNB	39.98	0.08	0%	348

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

**Contact Us:****Alinma Capital Company****Research Department (Sell-Side)**Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh  
55560

Saudi Arabia

Phone: 011-2185555 =86309

E-mail: [research@alinmacapital.com](mailto:research@alinmacapital.com)**Disclaimer**

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