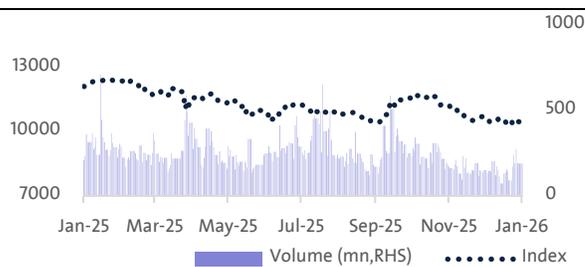


Daily Market Report

Key Indices-Return and Valuation

	04-Mar*	DoD	MTD	YTD	P/E	P/BV
TASI	10693	1.20%	-0.2%	1%	17.1	1.6
NOMU	22383	0.38%	-1.8%	-5%	0.0	1.6
S&P500	6870	0.78%	-0.1%	0%	21.8	5.4
Dow Jones	48739	0.49%	-0.5%	1%	15.3	5.6
FTSE 100	10568	0.80%	-3.1%	6%	15.3	2.5
EuroStoxx50	5871	1.72%	-4.4%	1%	16.1	2.5
Nikkei225	54246	-3.61%	-7.8%	8%	22.3	2.8
MSCI EM	1472	-3.64%	-8.6%	5%	17.0	2.4
SHCOMP	4082	-0.98%	-1.9%	3%	15.8	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
04-Mar	257	10	1	25:1

Money Market Yields

%	SAIBOR			Term SOFR		
	04-Mar	Δ bps	YTD Av	04-Mar	Δ bps	YTD Av
1M	4.71	3.3	5.6	3.67	0.7	4.3
3M	4.73	-14.8	5.4	3.67	1.1	4.3
6M	5.27	16.6	5.5	3.62	1.7	4.2
12M	4.85	4.8	5.2	3.48	4.3	4.0

Commodities

	Unit	04-Mar	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	82	-0.6	80	60	3.2
Brent	USDbbbl	81	0.0	79	59	2.4
Gold	USDOz	5184	-1.6	5502	2902	-9.2
Silver	USDOz	84	1.9	117	30	-18.9
Aluminum	USDton	3344	2.7	3252	2275	-3.1
Copper	USDton	13015	1.2	13952	8590	-6.1

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

SAL signs agreement to acquire 100% stake in Aviapartner Liège for SAR 123 mln

SAL Saudi Logistics Services Co. signed a sale and purchase agreement with Aviapartner Belgium NV and Aviapartner Holding NV to acquire 100% of their stake in Aviapartner Liège SA for SAR 123 million, on a cash- and debt-free basis. The acquisition will be financed through the company's available cash. **(Argaam)**

MIS signs contract with HUMAIN valued over 155% of 2024 revenue

Al Moammar Information Systems Co. (MIS) signed a contract with HUMAIN valued at more than 155% of the company's total revenues for 2024 (including VAT). In a statement to Tadawul, the company said the contract duration is 12 months, noting that it includes the design and construction of a private data center dedicated to artificial intelligence technologies. **(Argaam)**

AWPT wins SAR 93.6M contract from Jeddah Municipality

Alkhorayef Water and Power Technologies Co. (AWPT) won a contract worth SAR 93.59 million (excluding VAT) from Jeddah Municipality for the operation and cleaning of stormwater and surface water networks in Airport sub-municipality 20043-(MA). Under the contract, AWPT will clean stormwater and surface water networks in Airport sub-municipality 20043-(MA) within 60 months, according to a statement to Tadawul. **(Argaam)**

Al Ashghal Al Moysra signs SAR 17.99M project with Ministry of National Guard

Al Ashghal Al Moysra Co. said it signed on March 4 a project contract with the Ministry of National Guard, at a total value of SAR 17.99 million, including VAT, according to a statement to Tadawul. **(Argaam)**

Fakeeh Care EGM approves employee share program

Dr. Soliman Abdel Kader Fakeeh Hospital Co.'s (Fakeeh Care) shareholders approved the Employee Share Program (Long-Term Incentive Plan) for the group's employees, during an extraordinary meeting held on March 4. **(Argaam)**

Tadawul, Edaa seek public input on updated rules for multi-class listings

The Saudi Exchange Co. (Tadawul) and the Securities Depository Center (Edaa) have published the draft amended rules for multi-class listings for public consultation until March 18. **(Argaam)**

Global

UK economy expands in February but persisting cost pressures pose challenge for BoE

Britain's services sector grew robustly during February, according to a survey on Wednesday that also showed job cuts and price pressures persisted, a potential worry for the Bank of England ahead of this month's interest rate decision. The S&P Global UK Services Purchasing Managers' Index (PMI) fell slightly to 53.9 last month from January's five-month high of 54.0, but was in line with a preliminary reading. **(Reuters)**

China ramps up 'high stakes' tech race with US as economic imbalances deepen

China on Thursday vowed to deepen investment in high-tech industries and scientific innovation, framing them as essential to bolstering national security and self-reliance amid rising geopolitical tensions and an intensifying rivalry with the U.S. **(Reuters)**

Commodities

Asia refining margins rocket to highest in nearly 4 years on Hormuz supply disruption

Asian refining margins have surged to their highest since 2022 as Iranian threats to shipping through the Strait of Hormuz have disrupted crude oil flows and forced refineries to cut runs, according to data and analysts. Oil and gas prices have soared as fallout from the U.S.-Iran war has suspended trade through the chokepoint that typically handles more than 20% of daily global oil supplies. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		03-Mar	04-Mar	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2237	2264	1.2%	-4.8%	-7.3%
Value	mn	5725	6528	14.0%	3.7%	38.2%
Volume	mn	241	313	30.0%	21.5%	32.5%
NOMU						
Market Cap	mn	7193	7221	0.4%	-1.8%	-4.8%
Value	mn	16	15	-2.5%	4.4%	-20.2%
Volume	mn	1	1	5.5%	-35.1%	-44.7%

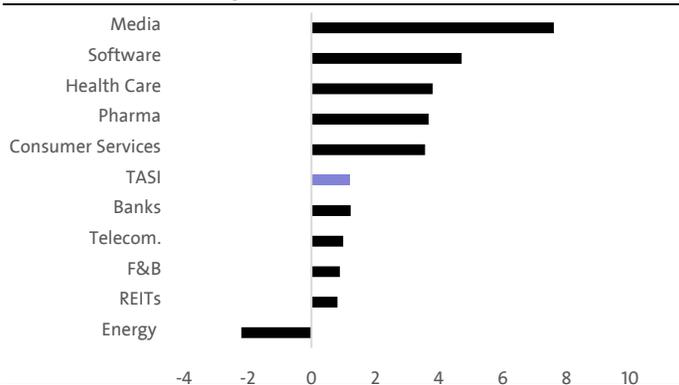
*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALUJAIN	24.31	2.21	10%
SRMG	78.95	7.15	10%
SPPC	7.08	0.64	10%

TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
SAUDI ARAMCO	26.1	-0.62	-2%
EMAAR EC	8.48	-0.17	-2%
GULF UNION ALAHLIA	9.33	-0.18	-2%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
05-Mar	BUPA ARABIA	General Assembly
05-Mar	SACO	Conference
08-Mar	SABIC AGRI-NUTRIENTS	Ex-dividends date
08-Mar	SABIC	Ex-dividends date
10-Mar	SAUDI ARAMCO	Financial results date

Source: Argaam, GSTAT

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ALMODAWAT	3.65	0.27	8%
JAMJOOM FASHION	157	11	8%
ALNAQOOL	38.6	2.6	7%

NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
TIBBIYAH	19.52	-1.85	-9%
LEAF	24.08	-1.92	-7%
SERVICE EQUIPMENT	28.2	-1.78	-6%

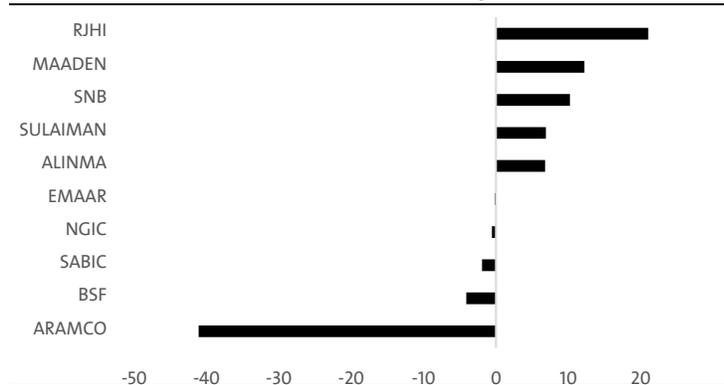
Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.01	0.05	3%	60.9
SAUDI ARAMCO	26.1	-0.62	-2%	23.9
JABAL OMAR	14.88	0.84	6%	12.4

TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.1	-0.62	-2%	634
ALRAJHI	99.25	1.3	1%	547
SNB	40.74	0.58	1%	382

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
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
11-Mar	U.S.	10-Year Note Auction	Feb		4.173%
13-Mar	U.S.	Core PCE Price Index	Feb	2.9%	2.8%

Source: Bloomberg, Investing.Com

Daily Market Report

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