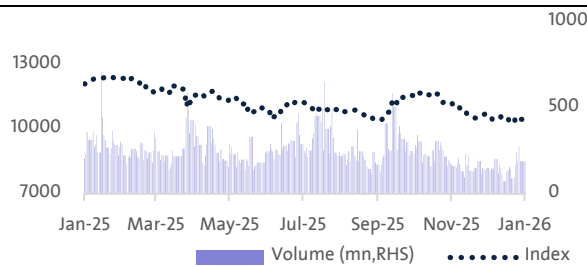


Daily Market Report

Key Indices-Return and Valuation

	11-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	11168	-0.41%	-1.9%	6%	17.6	1.6
NOMU	23487	-0.65%	-1.8%	0%	0.0	1.6
S&P500	6941	0.00%	0.0%	1%	25.0	5.6
Dow Jones	50121	-0.13%	2.5%	4%	14.9	6.0
FTSE 100	10472	1.14%	2.4%	5%	14.9	2.4
EuroStoxx50	6036	-0.19%	1.5%	4%	18.1	2.6
Nikkei225	57651	0.00%	8.1%	15%	23.4	2.8
MSCI EM	1564	0.95%	2.4%	11%	17.1	2.3
SHCOMP	4132	0.09%	0.3%	4%	15.9	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
11-Feb	66	192	8	0.3:1

Money Market Yields

%	SAIBOR			Term SOFR		
	11-Feb	Δ bps	YTD Av	11-Feb	Δ bps	YTD Av
1M	4.69	-4.4	5.6	3.66	-0.1	4.3
3M	4.88	6.2	5.4	3.64	-0.4	4.3
6M	5.20	7.4	5.5	3.57	-0.8	4.2
12M	4.76	-4.5	5.2	3.42	-0.8	4.0

Commodities

	Unit	11-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbbl	70	1.2	80	60	2.6
Brent	USDbbbl	69	0.9	79	59	2.1
Gold	USDOz	5070	0.4	5502	2861	-6.1
Silver	USDOz	84	4.3	117	30	-13.8
Aluminum	USDton	3071	0.4	3252	2275	-2.2
Copper	USDton	13385	2.2	13952	8590	-4.2

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

Aramco exports first condensate cargo from Jafurah field

Saudi Aramco sold oil from its \$100 billion Jafurah project in the first publicly announced export from the massive natural gas project, Bloomberg reported, citing sources. The oil that Aramco sold is condensate, a light oil liquid that's often found in gas deposits. It will go to buyers in Asia for loading later this month or in early March. Companies including energy majors and refiners in Asia bought several spot cargoes of the condensate. **(Argaam)**

SAR launches retail subscription for 1.67M shares at SAR 45

Retail investors start today, Feb. 12, subscribing to 1.67 million shares of Saleh Abdulaziz Al Rashed & Sons Co. (SAR) on the Main Market (TASI) at SAR 45 per share, based on the price determined through the book-building process. The retail offering will run for four days until Feb. 17. The retail tranche represents 30% of the total shares on offer. **(Argaam)**

Dar Al Arkan receives idle land fees invoices totaling SAR 201.2M

Dar Al Arkan Real Estate Development Co. received three invoices related to idle land fees to date, with a total value of SAR 201.2 million. The invoices relate to three land plots within Shams Ar Riyadh project, which is licensed under the Wafi program. The first invoice amounts to SAR 48.32 million, the second to SAR 108.10 million, and the third to SAR 44.73 million. **(Argaam)**

IHR signs SAR 6.9M framework deal with Financial Academy

International Human Resources Co. (IHR) signed today, Feb. 11, a framework agreement worth SAR 6.90 million (VAT inclusive) with Saudi Arabia's Financial Academy (FA). Under the deal, IHR will provide support services to the FA, according to a statement on Tadawul. The three-year agreement, effective from March 1, was awarded on Jan. 12, with signatures completed and a copy received today. **(Argaam)**

Global

US January budget deficit falls to \$95 billion as revenue gains outpace spending growth

The U.S. government posted a \$95 billion budget deficit in January, down \$34 billion or 26% from a year earlier as revenue gains including customs duties outpaced growth in outlays, the Treasury Department said on Wednesday. Adjusting for routine calendar shifts in benefit payments due to holidays, weekends and other factors in both years, the Treasury said the January deficit would have been \$30 billion, a decline of \$52 billion or 63% from January 2025. **(Reuters)**

Japan's wholesale inflation slows, weak yen pressures import costs

Japan's annual wholesale inflation slowed for a second consecutive month in January but yen-based import costs rose, highlighting the impact of a weak yen on prices and monetary policy. While wholesale price growth is expected to moderate in the coming months due partly to the effect of fuel subsidies, yen fluctuations will be key to the inflation outlook and timing of future interest rate hikes **(Reuters)**

Commodities

OPEC sees world demand for OPEC+ crude falling in second quarter

OPEC on Wednesday forecast world oil demand from the OPEC+ group will drop by 400,000 barrels per day in the second quarter, and published data indicating a small surplus in that quarter ahead of a key decision on whether to resume output increases. World demand for OPEC+ crude will average 42.20 million bpd in the second quarter, OPEC said in its monthly oil market report on its website, down from 42.60 million bpd in the first quarter. Both forecasts were unchanged from last month's report. **(Zawya)**

Daily Market Report

TASI & NOMU- Key Statistics

		10-Feb	11-Feb	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2374	2364	-0.4%	-1.9%	-3.1%
Value	mn	4537	4884	7.6%	2.3%	2.6%
Volume	mn	293	351	19.9%	40.6%	48.1%

		10-Feb	11-Feb	Δ%		
NOMU	SAR			DoD	MTD*	YTD*
Market Cap	mn	7626	7577	-0.6%	-1.8%	-0.1%
Value	mn	13	9	-33.5%	-48.4%	-53.8%
Volume	mn	1	2	37.9%	-10.1%	-32.2%

*Average for the period, Source: Argaam

TASI-Top Gainers

	Last Price	Change	
	SAR/sh	SAR	%
TECO	14.36	1.3	10%
ZAIN KSA	11.48	0.58	5%
ALMASAR ALSHAMIL	22.89	1.06	5%

TASI-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
ALMOOSA	150.4	-7.6	-5%
DALLAH HEALTH	113.5	-4.5	-4%
SRMG	100.9	-3.6	-3%

Source: Tadawul

NOMU-Top Gainers

	Last Price	Change	
	SAR/sh	SAR	%
ALTWIJRI	22.5	1.98	10%
NASEEJ TECH	46.7	3.2	7%
ALQEMAM	57.85	3.45	6%

NOMU-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
HAWYIA	13.07	-1.43	-10%
PAPER HOME	39.24	-3.76	-9%
LADUN	2.09	-0.16	-7%

Source: Tadawul

TASI -Most Traded by Volume

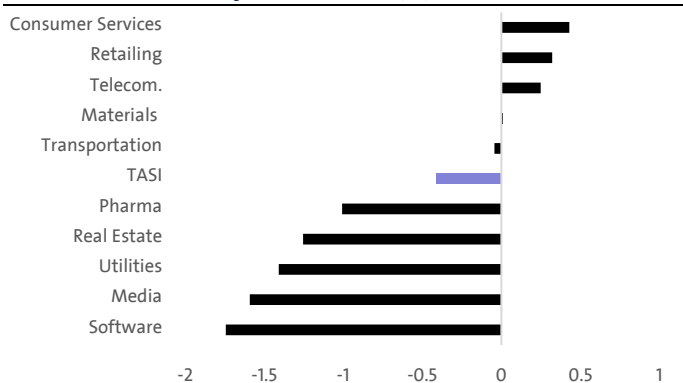
	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	1.97	0.01	1%	160.8
ZAIN KSA	11.48	0.58	5%	11.4
SNB	42.96	-0.4	-1%	7.8

TASI -Most Traded by Value

	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
SNB	42.96	-0.4	-1%	337
ALRAJHI	106	0	0%	335
AMERICANA	1.97	0.01	1%	317

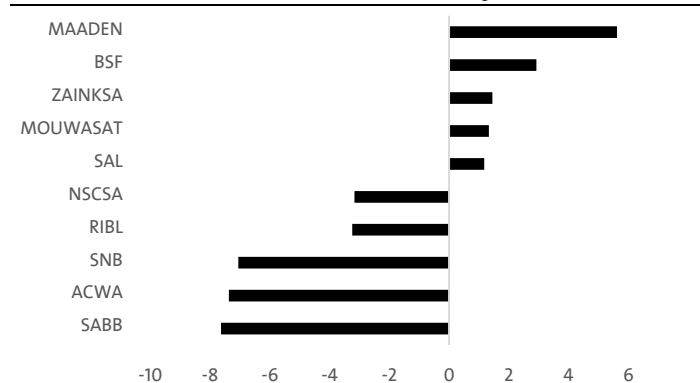
Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
12-Feb	Saleh Alrashed	IPO/ Subscription
12-Feb	ALKHABEER INCOME	Eligibility of cash dividend
15-Feb	General Authority For Statistics	Report
15-Feb	ALMODAWAT	Eligibility of cash dividend
16-Feb	ANB	Cash dividends

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
13-Feb	U.S.	Consumer Price Index (YoY)	Jan	2.7%	2.7%
14-Feb	C.Y.	New Loans	Jan	820.0B	390.0B
16-Feb	U.S.	Holiday			
18-Feb	U.S.	Durable goods	Jan	3.1%	-2.1%
18-Feb	U.S.	Initial Jobless Claims	Jan	212.00K	209.00K

Source: Bloomberg, Investing.Com

Daily Market Report

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