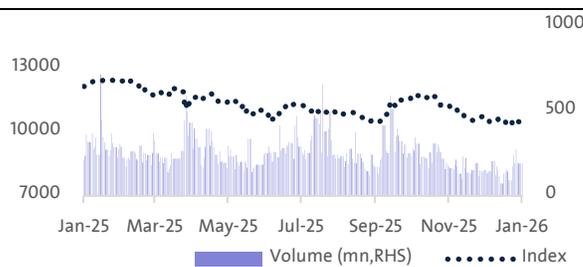


Daily Market Report

Key Indices-Return and Valuation

	16-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	11098	-0.77%	-2.5%	5%	17.5	1.6
NOMU	23549	-0.91%	-1.5%	0%	0.0	1.6
S&P500	6843	0.10%	-1.4%	0%	24.7	5.5
Dow Jones	49533	0.07%	1.3%	3%	15.6	5.9
FTSE 100	10556	0.79%	3.3%	6%	15.6	2.4
EuroStoxx50	6022	0.72%	1.2%	4%	18.1	2.6
Nikkei225	56566	-0.42%	6.1%	12%	24.6	2.8
MSCI EM	1556	-0.14%	1.8%	11%	17.3	2.4
SHCOMP	4082	0.00%	-0.9%	3%	15.7	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
17-Feb	42	216	8	0.2:1

Money Market Yields

%	SAIBOR			Term SOFR		
	17-Feb	Δ bps	YTD Av	14-Feb	Δ bps	YTD Av
1M	4.63	-4.9	5.6	3.66	0.4	4.3
3M	4.90	17.9	5.4	3.66	0.3	4.3
6M	5.22	7.9	5.5	3.60	-0.3	4.2
12M	4.80	3.8	5.2	3.44	-1.9	4.0

Commodities

	Unit	17-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbl	67	0.0	80	60	2.8
Brent	USDbbl	67	-1.8	79	59	2.2
Gold	USDOz	4922	-1.7	5502	2861	-7.0
Silver	USDOz	74	-4.0	117	30	-15.1
Aluminum	USDton	2999	-0.6	3252	2275	-2.4
Copper	USDton	12674	-1.5	13952	8590	-4.7

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 Arabia's mega 488-key ultra resort opens in KAEC

Saudi Tourism Development Fund (TDF) has joined hands with Emaar Economic City to celebrate the opening of the kingdom's largest all-inclusive ultra resort - Rixos Murjana - within its key development King Abdullah Economic City. **(Zawya)**

Alramz receives SAR 35.3M in white land fee invoices

Alramz Real Estate Co. said it received 94 invoices to date related to white land fees, with a total value of SAR 35.33 million. In a statement to Tadawul, the company said the invoices are related to land plots it owns in Riyadh that fall within the geographic zones subject to the white land fee program. **(Argaam)**

Jabal Omar receives white land fees invoices of SAR 31M

Jabal Omar Development Co. has received several invoices related to white land fees in the amounts of SAR 7.59 million, SAR 7.42 million, and SAR 16.03 million for the years 2022, 2023, and 2024, respectively. **(Argaam)**

Saudi's Public Investment Fund transfers stake in Take-Two Interactive

Saudi Arabia's Public Investment Fund has transferred its stake in Take-Two Interactive to a subsidiary, a regulatory filing showed on Tuesday, ahead of the videogame publisher's highly anticipated launch of "Grand Theft Auto VI." **(Zawya)**

AYYAN inks MoU to set up private fund for SAR 600M project

AYYAN Investment Co. signed a non-binding memorandum of understanding (MoU) with Al Rajhi Capital and Sumou Holding Co. to establish a private real estate fund to develop a mixed-use project in Riyadh's Al Janadriyah district, with an estimated value exceeding SAR 600 million. **(Argaam)**

Global

Japan exports jump, business mood improves as IMF warns of risks to growth

Japan's exports jumped in January and manufacturers' confidence improved this month, data showed on Wednesday, offering Tokyo some hope that robust Asian demand will help shore up a stuttering economy as it navigates global and domestic risks. Prime Minister Sanae Takaichi's tax cut and spending plans could inject much needed momentum, analysts say, but she faces the challenge of avoiding a renewed yen and bond selloff that jolted investor confidence last month. **(Reuters)**

Fed's Barr says central bank likely on hold for some time as it watches for easing inflation

Federal Reserve Governor Michael Barr said on Tuesday that another central bank interest rate cut could come somewhere well down the road amid ongoing risks to the U.S. inflation outlook. "Based on current conditions and the data in hand, it will likely be appropriate to hold rates steady for some time as we assess incoming data, the evolving outlook, and the balance of risks," Barr said in a speech given before a gathering of the New York Association for Business Economics in New York. **(Reuters)**

Commodities

Oil trims losses as traders weigh progress in US-Iran talks

Oil prices steadied in Asian trade on Wednesday after falling about 2% in the previous session as investors assessed progress in U.S.-Iran talks but remained cautious about the prospects of a final deal that could ease supply concerns. Brent futures rose 23 cents or 0.34% to \$67.65 a barrel by 0412 GMT, while U.S. West Texas Intermediate (WTI) crude was up 19 cents or 0.3% at \$62.52. Both are around two-week lows. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

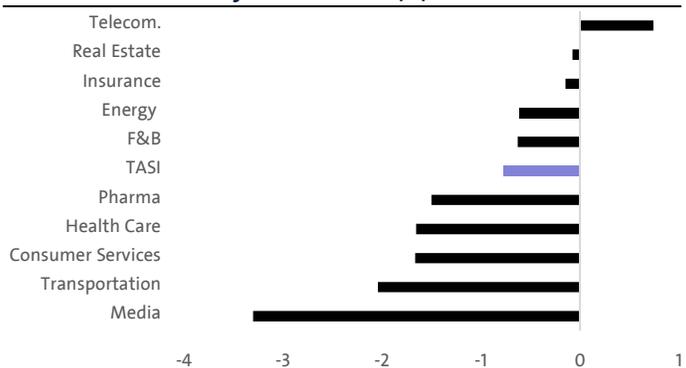
		15-Feb	16-Feb	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2382	2349	-1.4%	-2.5%	-3.7%
Value	mn	5379	4560	-15.2%	-2.0%	-3.4%
Volume	mn	335	223	-33.3%	-9.0%	-5.5%
NOMU						
Market Cap	mn	7627	7597	-0.4%	-1.5%	0.1%
Value	mn	14	19	32.0%	6.1%	-3.1%
Volume	mn	2	2	48.7%	30.2%	-1.0%

*Average for the period, Source: Argaam

TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
TECO	15.02	1.29	9%
SHL	16	0.69	5%
ALMASAR ALSHAMIL	23.88	0.82	4%
TASI-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
AMAK	96	-6.8	-7%
MIS	164.2	-8.9	-5%
NCLE	124.3	-6	-5%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
18-Feb	EXTRA	Conference
19-Feb	SULAIMAN ALHABIB	Eligibility of cash dividend
19-Feb	TAMKEEN	Eligibility of cash dividend
19-Feb	Budget	Eligibility of bonus share
19-Feb	SADAFCO	Ex dividend date

Source: Argaam, GSTAT

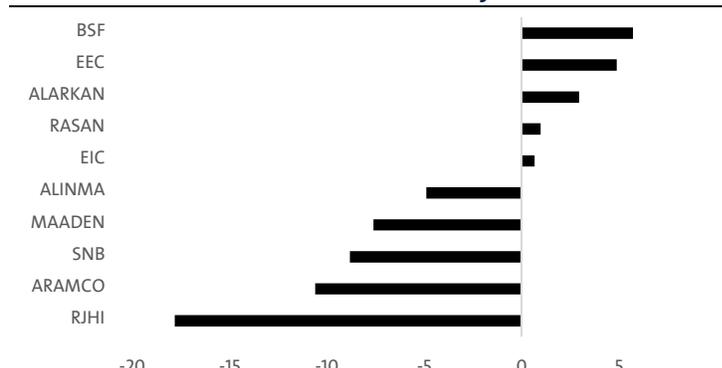
NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
AMWAJ INTERNATIONAL	21.99	1.45	7%
HORIZON FOOD	38.7	2.32	6%
MULKIA	45	2.62	6%
NOMU-Top Losers	Last Price	Change	
	SAR/sh	SAR	%
MULTI BUSINESS	9.01	-1.2	-12%
NBM	64.3	-6	-9%
NASEEJ TECH	44	-4	-8%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.04	0	0%	###
SAUDI KAYAN	5.58	-0.2	-3%	9.4
BSF	19.3	0.49	3%	9.1
TASI -Most Traded by Value	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	104.6	-1.1	-1%	326
RASAN	142	2.9	2%	251
BSF	19.3	0.49	3%	175

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
18-Feb	U.S.	Durable goods	Jan	3.1%	-2.1%
18-Feb	U.S.	Initial Jobless Claims	Jan	212.00K	209.00K
18-Feb	U.K.	Consumer price index YoY	Jan	3.3%	3.2%
19-Feb	U.S.	Crude Oil Inventories	Jan	-200.0K	-3.455M
20-Feb	U.S.	New home sales	Jan	716.00K	738.00K

Source: Bloomberg, Investing.Com

Daily Market Report

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