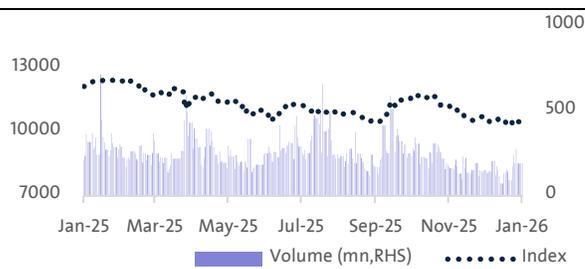


Daily Market Report

Key Indices-Return and Valuation

	18-Feb*	DoD	MTD	YTD	P/E	P/BV
TASI	11155	0.52%	-2.0%	6%	17.6	1.6
NOMU	23623	0.31%	-1.2%	0%	0.0	1.6
S&P500	6881	0.56%	-0.8%	1%	24.8	5.5
Dow Jones	49663	0.26%	1.6%	3%	15.8	5.9
FTSE 100	10686	1.23%	4.5%	8%	15.8	2.4
EuroStoxx50	6103	1.35%	2.6%	5%	18.3	2.6
Nikkei225	57144	1.02%	7.2%	14%	24.6	2.8
MSCI EM	1561	0.33%	2.1%	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
18-Feb	151	100	13	0.5:1

Money Market Yields

%	SAIBOR			Term SOFR		
	18-Feb	Δ bps	YTD Av	17-Feb	Δ bps	YTD Av
1M	4.60	-7.4	5.6	3.67	0.2	4.3
3M	4.96	24.2	5.4	3.65	-0.4	4.3
6M	5.20	5.6	5.5	3.59	-1.2	4.2
12M	4.78	1.4	5.2	3.41	-2.8	4.0

Commodities

	Unit	18-Feb	Δ	52-week		YTD Av
		USD	%	Hi	low	%Δ
Arab Light	USDbbl	67	0.0	80	60	2.9
Brent	USDbbl	70	4.3	79	59	2.3
Gold	USDOz	4917	-0.1	5502	2861	-7.2
Silver	USDOz	77	5.0	117	30	-15.4
Aluminum	USDton	3055	1.9	3252	2275	-2.5
Copper	USDton	12701	0.2	13952	8590	-4.8

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

Al Akaria leases residential complex for SAR 1.2B in Riyadh

Saudi Real Estate Co. (Al Akaria) leased Al Reef Residential Compound, located in Riyadh's Diplomatic Quarter, to Amsa View for Hotel Apartments. The lease, valued at SAR 1.2 billion (excluding VAT), has a 20-year term. In a statement to **Tadawul**, Al Akaria said the complex comprises 240 residential units, including 176 apartments along with 64 villas and townhouses, in addition to a showroom. The project is currently in its final stages of construction. **(Argaam)**

Almarai proposes 10M share buyback

Almarai Co.'s board of directors recommended the buyback of 10 million shares, to be held as treasury shares and allocated for the long-term incentive scheme, according to a statement to **Tadawul**. **(Argaam)**

Red Sea unit signs contract for project in Riyadh

Red Sea International Co. announced that its subsidiary, Fundamental Installation for Electric Work Co. Ltd. (First Fix), signed a subcontract on Feb. 18 with a joint venture between Al Bawani and Urbacon Saudi Co. to execute mechanical, electrical, plumbing, and civil works for one of its projects in Riyadh. **(Argaam)**

Delivery commissions on local restaurants deemed highest globally: Mukatafa

Prince Waleed bin Nasser Al Saud, Chairman of Mukatafa Foundation, said the share of local restaurant sales via delivery has surged from 20% to around 60% over the past four years, noting that delivery services have become a fundamental consumer demand. Speaking to Al-Ekhbariya TV, the top executive explained that the commission rates imposed by delivery platforms on local restaurants are among the highest worldwide, which has taken a toll on the restaurant and café sector. **(Argaam)**

Global

BOJ to hike policy rate to 1% by end-June, sooner than forecast before election - Reuters poll

The Bank of Japan is likely to raise its key interest rate to 1% by end-June, according to a majority of economists polled by Reuters, with some expecting a move as soon as April because of mounting concerns about rising inflation and a weak yen. In the first survey of forecasters since Prime Minister Sanae Takaichi swept to a landslide election win on February 8 in the best-ever result for her Liberal Democratic Party, the consensus view for the next hike has shifted from end-September. **(Reuters)**

US manufacturing output posts biggest gain in 11 months in January

U.S. factory production increased by the most in 11 months in January, offering hope for a manufacturing sector that has been squeezed by import tariffs and high interest rates. Manufacturing output rose 0.6% last month, the largest gain since February 2025, after being unchanged in December, the Federal Reserve said on Wednesday. **(Reuters)**

Commodities

Oil prices extend gains on concerns of potential US-Iran conflict

Oil prices rose in Asian trade on Thursday as the U.S. and Iran attempted to ease a standoff in talks over Tehran's nuclear programme while both sides heightened military activity in the key oil-producing region. Brent futures climbed 24 cents, or 0.3% to \$70.59 a barrel by 0415 GMT, while U.S. West Texas Intermediate (WTI) crude gained 28 cents, or 0.4%, to trade at \$65.47 a barrel. **(Reuters)**

Daily Market Report

TASI & NOMU- Key Statistics

		17-Feb	18-Feb	Δ%		
TASI	SAR			DoD	MTD*	YTD*
Market Cap	bn	2382	2361	-0.9%	-2.0%	-3.2%
Value	mn	2988	3762	25.9%	-19.2%	-20.3%
Volume	mn	216	204	-5.6%	-17.0%	-13.8%
NOMU						
Market Cap	mn	7627	7621	-0.1%	-1.2%	0.4%
Value	mn	16	12	-26.7%	-30.8%	-36.8%
Volume	mn	2	2	-13.0%	-11.3%	-32.6%

*Average for the period, Source: Argaam

TASI-Top Gainers

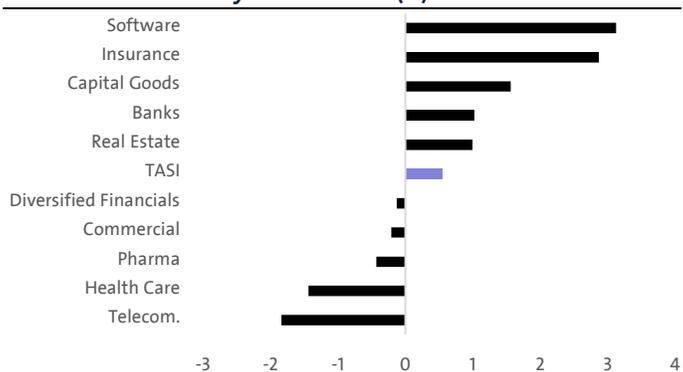
	Last Price	Change	
	SAR/sh	SAR	%
ENAYA	8.7	0.69	9%
BUPA ARABIA	179.3	13.3	8%
RETAL	13	0.73	6%

TASI-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
CARE	141.5	-16	###
YANSAB	27.2	-1.4	-5%
MBC GROUP	31.08	-1.3	-4%

Source: Tadawul

TASI- Sector-Wise Daily Performance (%)



Source: Bloomberg

TASI Market Calendar

Date	Stock/Data release	Event
19-Feb	SULAIMAN ALHABIB	Eligibility of cash dividend
19-Feb	TAMKEEN	Eligibility of cash dividend
19-Feb	SADAFCO	Eligibility of cash dividend
22-Feb	Vacations	Official holidays and vacations
22-Feb	KESAY CLINICS	Close of offering

Source: Argaam, GSTAT

NOMU-Top Gainers

	Last Price	Change	
	SAR/sh	SAR	%
AME	116	9	8%
WSM	26.5	1.52	6%
ALHASOOB	32.68	1.68	5%

NOMU-Top Losers

	Last Price	Change	
	SAR/sh	SAR	%
MULKIA	40.66	-4.3	###
SPC	29	-2.9	-9%
MAYAR	1.41	-0.1	-9%

Source: Tadawul

TASI -Most Traded by Volume

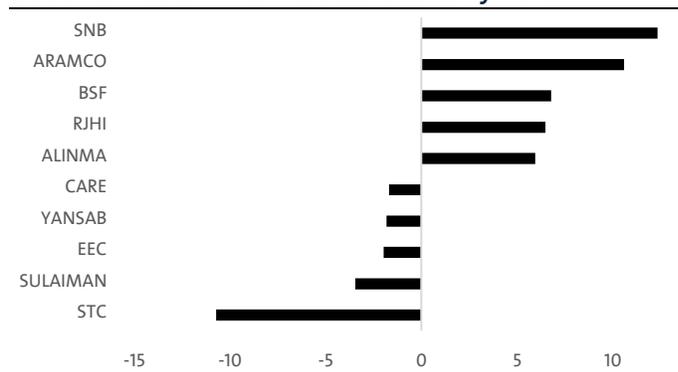
	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
AMERICANA	2.08	0.04	2%	###
BSF	19.88	0.58	3%	8.3
JAHEZ	12.65	0.27	2%	8.1

TASI -Most Traded by Value

	Last Price	Change		Value
	SAR/sh	SAR	%	SARmn
ALRAJHI	105	0.4	0%	262
STC	43.6	-1.2	-3%	257
BSF	19.88	0.58	3%	164

Source: Tadawul

TASI: Point Contribution to TASI movement by Stocks



Source: Bloomberg

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
19-Feb	U.S.	Crude Oil Inventories	Jan	-200.0K	-3.455M
20-Feb	U.S.	New home sales	Jan	716.00K	738.00K
24-Feb	U.S.	Consumer confidence	Feb	90.6	3.2%
25-Feb	E.U.	Consumer price index	Jan	1.7%	2.0%
26-Feb	U.S.	Initial Job Claims	Jan	222.00K	232.00K

Source: Bloomberg, Investing.Com

Daily Market Report

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