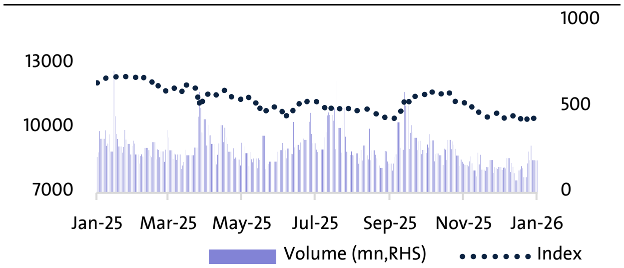
Daily Market Report

Key Indices-Return and Valuation

	08-Jul*	DoD	MTD	YTD	P/E	P/BV
TASI	10854	0.0%	0.0%	3%	14.2	1.6
NOMU	22595	-0.3%	-1.4%	-4%	0.0	1.6
S&P500	7483	-0.3%	0.0%	9%	21.8	5.7
Dow Jones	52348	-1.1%	0.1%	9%	13.0	6.2
FTSE 100	10489	-1.7%	0.1%	6%	13.0	2.3
EuroStoxx50	6205	-1.8%	-1.2%	7%	15.9	2.6
Nikkei225	66819	-2.1%	-5.2%	33%	23.6	3.1
MSCI EM	1678	-0.6%	-2.6%	19%	12.3	2.5
SHCOMP	3971	-0.5%	-3.4%	0%	14.1	1.6

TASI- Index and Volume Trends



Advance to Decline Ratio

	Advance	Decline	Unchanged	A/D
08-Jul	62	200	8	0.3:1

Money Market Yields

%	SAIBOR			Term SOFR		
	08-Jul	Δ bps	YTD Av	08-Jul	Δ bps	YTD Av
1M	4.75	12.0	5.6	3.67	0.2	4.3
3M	4.85	2.2	5.4	3.74	0.8	4.3
6M	5.31	9.5	5.5	3.85	0.7	4.2
12M	4.95	2.1	5.2	3.99	-0.5	4.0

Commodities

		08-Jul	Δ	52-week		YTD Av
	Unit	USD	%	Hi	low	%Δ
Arab Light	USDbbl	82	6.4	135	60	-11.7
Brent	USDbbl	78	5.2	118	59	-10.9
Gold	USDOz	4102	-1.1	5502	3277	-14.8
Silver	USDOz	58	-2.8	117	36	-36.6
Aluminum	USDton	3129	-0.1	3851	2553	-14.0
Copper	USDton	13169	-1.4	14140	9594	-15.9

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

IMF raises Saudi Arabia's 2027 growth forecast to 5.5%

The International Monetary Fund (IMF) has raised Saudi Arabia's economic growth forecast for 2027 to 5.5%, up from the 4.5% it projected in April. The fund lowered the Kingdom's 2026 growth forecast to 1.7%, from the 3.1% projected in April, according to IMF's July 2026 World Economic Outlook Update. **(Argaam)**

ASG signs 20-year lease for industrial land in Sudair

ASG Plastic Factory Co. signed a 20-year land lease agreement today with Saudi Authority for Industrial Cities and Technology Zones (MODON) to lease an industrial plot spanning 100,380 square meters in Sudair Industrial City. **(Argaam)**

SRC completes pricing $2.75B Sukuk issuance

Saudi Real Estate Refinance Co. (SRC), wholly owned by the Public Investment Fund (PIF), announced the successful pricing of its third international sukuk issuance, guaranteed by the Government of Saudi Arabia, with a total value of $2.75 billion. According to state-run news agency SPA, the issuance was divided into two tranches: The first tranche amounted to $1.25 billion with a 5.5-year maturity, and the second tranche totaled $1.50 billion with a 10-year maturity. **(Argaam)**

AlNaqool's subsidiary buys 50 trucks in SAR 14.9M deal

Mohammed Hassan Al Naqool Sons Co. announced that its wholly owned subsidiary, Sadan Industrial Co., has signed an agreement to purchase 50 new trucks, at a value of SAR 14.9 million. **(Argaam)**

Saudi Arabia rises to 13th in FDI rankings

Saudi Arabia ranked 13th among the world's top 20 host economies for foreign direct investment (FDI) in 2025. According to the World Investment Report 2026 issued by the United Nations Conference on Trade and Development (UNCTAD), the Kingdom's ranking improved after FDI inflows surged nearly 57% to $33 billion in 2025 from $21 billion a year earlier. **(Reuters)**

Global

German exports rise unexpectedly in May

German exports rose unexpectedly in May, increasing by 0.9% compared with the previous month, data from the federal statistics office showed on Thursday. Imports were down 2.5% on a calendar and seasonally adjusted basis. The foreign trade balance showed a surplus of €19.1 billion in May, up from €14.7 billion in April. Exports to EU countries dropped by 1.1% on the month, while exports of goods to countries outside the EU increased by 3.6%. **(Reuters)**

Chip euphoria vies with war weariness

The U.S. bombed Iran for a second day, Iran struck U.S. bases in the Gulf and oil prices have jumped almost 10% in three days, with President Donald Trump declaring on Wednesday the interim deal with Iran and further talks to end the war were "over". If there's one bright spot it's that, despite the danger, shipping is still transiting the Strait of Hormuz, albeit at a reduced volume. **(Reuters)**

Commodities

Oil rises after US launches fresh strikes on Iran

Oil prices rose more than 1% on Thursday after the U.S. carried out fresh strikes on Iran, denting hopes for talks to end their war and for the full reopening of the Strait of Hormuz, a chokepoint for one-fifth of pre-war global oil supplies. Brent crude futures rose 86 cents, or 1.1%, to $78.88 a barrel by 0352 GMT. U.S. West Texas Intermediate crude futures were up 85 cents, or 1.2%, at $74.37 a barrel. **(Reuters)**

Please refer to page III for important disclosures

Daily Market Report

TASI & NOMU- Key Statistics						
		07-Jul	08-Jul	Δ%		
TASI	SAR			**DoD**	**MTD***	**YTD***
Market Cap	bn	2273	2273	0.0%	1.0%	2.0%
Value	mn	4309	4369	1.4%	4.8%	-15.2%
Volume	mn	216	228	5.6%	-3.5%	-9.4%
NOMU						
Market Cap	mn	7312	7289	-0.3%	-1.4%	-3.9%
Value	mn	12.0	12.1	0.4%	-0.3%	-47.6%
Volume	mn	2.0	2.3	16.1%	6.8%	-2.5%

*Average for the period, Source: Argaam

NOMU-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
AQASEEM	3.78	0.65	21%
THARWAH	28.9	3.4	13%
MSGA	6.6	0.6	10%
NOMU-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
TAQAT	7.76	-0.74	-9%
RATIO	4.05	-0.35	-8%
RIYAL	13.17	-1.09	-8%

Source: Tadawul

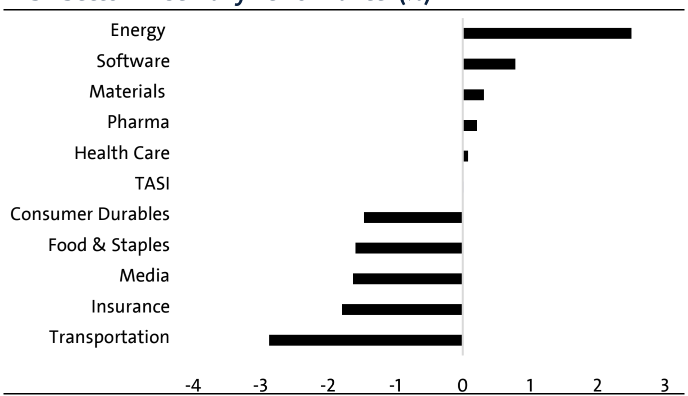
TASI-Top Gainers	Last Price	Change	
	SAR/sh	SAR	%
ENTAJ	25.56	2.14	9%
TANMIAH	59.65	4.55	8%
ALMAWARID	108.1	4.5	4%
TASI-Top Losers	**Last Price**	**Change**	
	SAR/sh	SAR	%
TASHEEL	31.6	-3.5	-10%
ENAYA	9.86	-1.09	-10%
THIMAR	37.38	-2.62	-7%

Source: Tadawul

TASI -Most Traded by Volume	Last Price	Change		Volumes
	SAR/sh	SAR	%	mn
APC	7.36	0.24	3%	13.3
AMERICANA	2.05	-0.03	-1%	12.1
PETRO RABIGH	13.39	-0.31	-2%	11.9
TASI -Most Traded by Value	**Last Price**	**Change**		**Value**
	SAR/sh	SAR	%	SARmn
SAUDI ARAMCO	26.84	0.68	3%	308
ALRAJHI	65.45	-0.5	-1%	227
PETRO RABIGH	13.39	-0.31	-2%	162

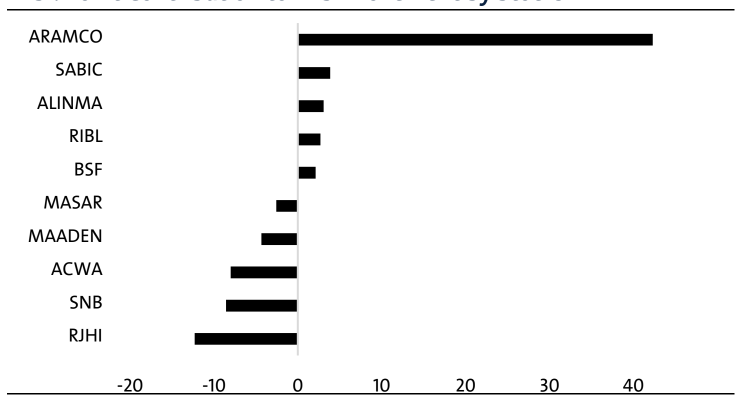
Source: Tadawul

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
09-Jul	KINGDOM	Cash Dividend
09-Jul	SHL	Cash Dividend
09-Jul	General Authority For Statistics	Report
12-Jul	SVCP	Ex-dividend Date
14-Jul	CHEMANOL	Capital Reduction

Source: Argaam, GSTAT

Global Market Calendar

Date	Country	Event	Period	Forecast	Previous
09-Jul	U.K.	RICS House Price Balance	Jun		
09-Jul	U.S.	Initial Jobless Claims	Jun	219.0K	216.0K
09-Jul	C.N.	Consumer Price Index	Jun	1.3%	1.2%
14-Jul	U.S.	Consumer Price Index	Jun	4.2%	3.8%
16-Jul	U.K.	(GDP) MoM	Jun	-0.1%	0.3%

Source: Bloomberg, Investing.Com

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