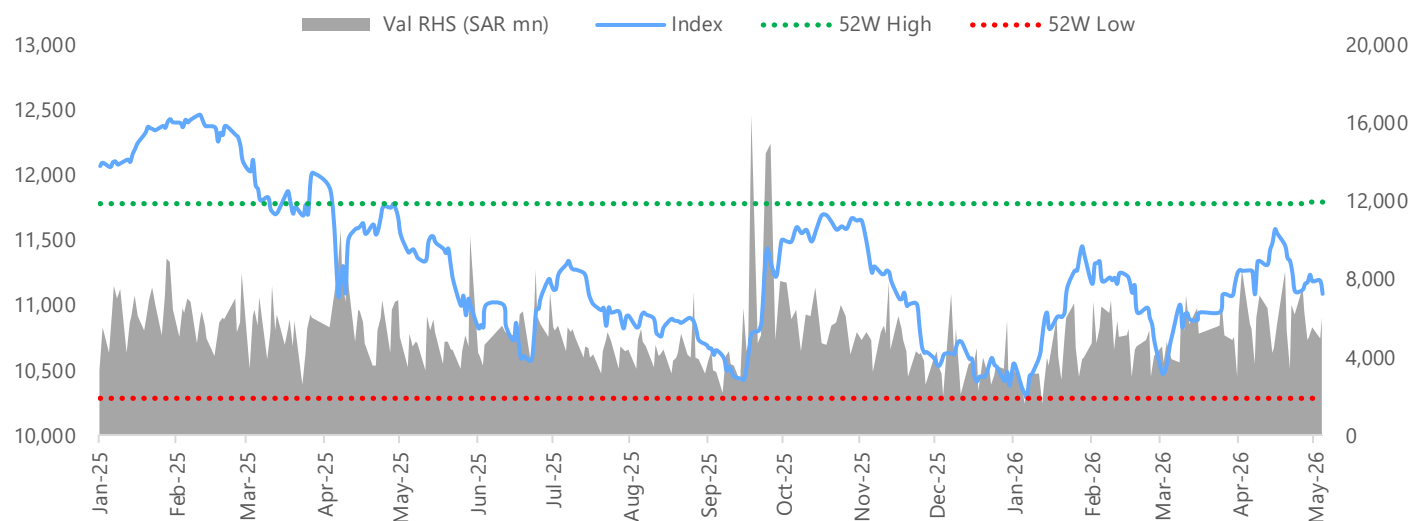


Daily Market Watch

Tuesday, May 5, 2026

Main Market TASI						Nomu Market											
Last Close			Value Traded (SR bn)			Index Performance			Last Close			Value Traded (SR mn)			Index Performance		
▼ 11,090.65			▲ 6.1			▲ 5.7% YTD			▼ 22,806.97			▼ 20.9			▼ -2.1% YTD		
DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y	DoD	MTD	YTD	DoD	3M	6M	1Y	3Y	5Y
-0.9%	-0.9%	5.7%	41.5%	32.0%	-9.2%	-2.8%	-0.3%	7.5%	-0.6%	-0.3%	-2.1%	-11.8%	-4.7%	-37.9%	-18.6%	9.1%	-8.7%

TASI Performance



Markets Performance/News

- U.S. equities edged lower on Monday, with investors showing caution after reports of increased hostilities in the Strait of Hormuz that tempered market sentiment despite solid first quarter earnings season. The S&P 500 declined 0.4%, the Nasdaq slipped 0.2%, and the Dow Jones fell 1.1%. Asian markets were also softer on Tuesday morning as regional conflict developments in the Middle East continued to influence risk appetite. The Hang Seng Index was down 1.2%, while the MSCI AC Asia Pacific Index eased 0.3%. (Reuters)
- TASI fell 0.9% (-102.2 points) to close at 11,090.65. Trading value increased by 41.5% compared to the previous session. The Household and Personal Products sector witnessed the most contraction, falling 6.6%. Among the top laggards, Middle East Healthcare Co. (MEH AB) and Nofoth Food Products Co. (NOFOTH AB) dropped 7.3% each, while Al Majed Oud Co. (ALMAJED AB) declined by 6.6%. (Tadawul)

Major Economic/Sector News

- Saudi Arabia's non-oil private sector swung back to growth in April as output and new business rebounded. The seasonally adjusted Riyadh Bank Saudi Arabia Purchasing Managers' Index (PMI) rose to 51.5 in April from 48.8 in March. A reading above 50.0 separates growth from contraction. (Zawya)
- Aseer Development Authority (ASDA) is working to finalise the consortium that will undertake the Abha airport expansion under a public-private partnership (PPP) model. The expansion will be built north of the existing airport, increasing its capacity to 12 mn passengers. Work on the project is expected to start in early 2027 and will be completed within five years. (Zawya)

Major Corporate News

Result Announcements

Company	TASI Code	Bloomberg Code	Net Profit (SAR mn)		Change YoY		Consensus	Variance
			1Q26	1Q25	SAR mn	%	SAR mn	%
RIYADH CABLES	4142	RIYADHCA AB	282.0	256.2	25.8	10.1	254.5	10.8
MIS	7200	MIS AB	12.1	33.9	-21.7	-64.1	-	-
SIG	2250	SIG AB	252.0	18.0	234.0	1300.0	9.2	2639.1
GASCO	2080	NGIC AB	82.2	61.9	20.3	32.8	-	-

Result Announcements

Company	TASI Code	Bloomberg Code	Net Profit (SAR mn)		Change YoY		Consensus	Variance
			1Q26	1Q25	SAR mn	%	SAR mn	%
CITY CEMENT	3003	CITYC AB	30.2	51.5	-21.4	-41.4	25.1	20.4
BATIC	4110	BATIC AB	12.3	13.7	-1.4	-10.5	-	-
ARABIAN SHIELD	8070	SHIELD AB	4.9	6.5	-1.6	-24.1	-	-
ALETIHAD	8170	ALETIHAD AB	-39.6	-11.9	-27.6	232.0	-	-
GAS	4146	GAS AB	38.2	31.3	6.8	21.9	40.10	-4.7
SIPCHEM	2310	SIPCHEM AB	-215.3	195.3	-	-	-	-
SPORT CLUBS	6018	SPORTCLU AB	4.4	3.4	1.0	29.2	-	-

Source: Tadawul, Bloomberg

- Foreign institutions were net buyers of SAR 3.4 bn worth of stocks on the Saudi Exchange (Tadawul) in April 2026. Total buy transactions reached SAR 44.4 bn, compared to sell trades of SAR 41 bn. They accounted for 35.4% of total buy transactions in TASI, compared to 32.69% of total sell trades. (Argaam)
- CATRION Catering Holding Co. (CATERING AB) extended its contract with flynas (FLYNAS AB) for the provision of inflight catering services and selling onboard food, beverage, and other supplies at a provisional value of SAR 197.4 mn. The related financial impact will reflect on its results starting from 3Q26. (Argaam)
- Arabian Centres Co. (CENOMICE AB) expects to record the financial impact of Westfield Jeddah and Westfield Riyadh projects after their inauguration. The Westfield Jeddah has become close to opening after completing construction works and reaching a pre-leasing rate of 96%, while Westfield Riyadh reached a construction completion rate of 99% and a pre-leasing rate of 92%. Limited financial impact is expected during 2026 due to partial operation, while the larger impact is expected to appear as the pace of operations increases. (Argaam)

Event Calendar

Date	Company	Event
05-May-26	Saudi Energy Co.	Eligibility for Dividend (SAR 0.70/sh)
05-May-26	Saudi Energy Co.	Ordinary Assembly Meeting
05-May-26	Bank Albilad	Eligibility for Dividend (SAR 0.55/sh)
05-May-26	Bank Albilad	Ordinary Assembly Meeting
05-May-26	Advanced Petrochemical Co.	Ordinary Assembly Meeting
05-May-26	Derayah REIT Fund	Eligibility for Dividend (SAR 0.10/sh)
05-May-26	AlSaif Stores for Development and Investment Co.	Cash Dividend Distribution (SAR 0.06/sh)
05-May-26	Sama Healthy Water Factory Co.	Ordinary Assembly Meeting
05-May-26	Alwasail Industrial Co.	Eligibility for Dividend (SAR 0.08/sh)
05-May-26	Alwasail Industrial Co.	Extraordinary General Meeting

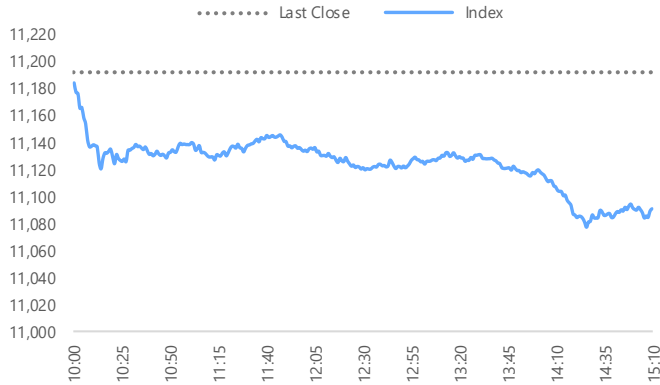
Source: Argaam, Bloomberg

Economic Calendar

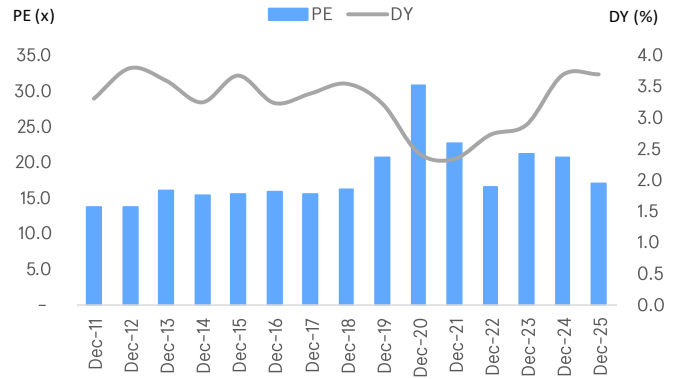
Date	Event	Prior	Estimation
05-May-26	KSA Budget Balance (SAR)	-94.9B	-
05-May-26	KSA S&P Global PMI	48.8	-
05-May-26	KSA Official Reserve Assets (SAR)	1,862.4B	-
05-May-26	US Weekly API Report on Crude Oil Inventories	-	-
05-May-26	US S&P Global Services PMI (MoM)	49.8	51.3
05-May-26	US ISM Non-Manufacturing PMI (MoM)	54.0	53.7

Source: Argaam, Bloomberg, Investing.com

TASI Intraday Performance



Historical Tadawul PE and DY



Top Performers – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Media & Ent.	11,951.5	2.3%	51.9	-26.2%
Insurance	8,935.7	1.5%	20.6	20.0%
Energy	5,288.7	0.4%	15.1	16.4%
REITs	3,011.0	0.0%	N/A	3.1%
Capital Goods	17,275.5	-0.0%	17.1	15.7%

Top Laggards – Sectors

	Last Close	%Δ	Forward P/E (x) *	YTD %Δ
Household & Personal	4,613.3	-6.6%	N/A	1.0%
Healthcare	9,072.4	-3.7%	22.1	-8.1%
Software & Svc.	49,912.0	-2.7%	18.7	-14.1%
Materials	5,523.8	-2.1%	26.4	11.7%
RE Mgmt & Dev	2,938.1	-1.3%	15.2	2.1%

Top Performers – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
ALSAGR INSURANCE	11.5	10.0%	1.9	20.8
AMANA INSURANCE	6.8	10.0%	3.0	19.9
ENAYA	11.1	6.7%	2.6	28.3
ACIG	6.8	5.4%	1.0	7.1
GAS	16.5	5.4%	1.6	27.2

Top Laggards – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Middle East Healthcare	34.7	-7.3%	2.3	81.9
NOFOTH	8.0	-7.3%	0.9	7.1
Al Majed Oud Co.	133.6	-6.6%	0.3	43.2
Alujain Corp.	29.2	-6.5%	1.9	54.1
National Medical Care	113.0	-6.1%	0.3	38.5

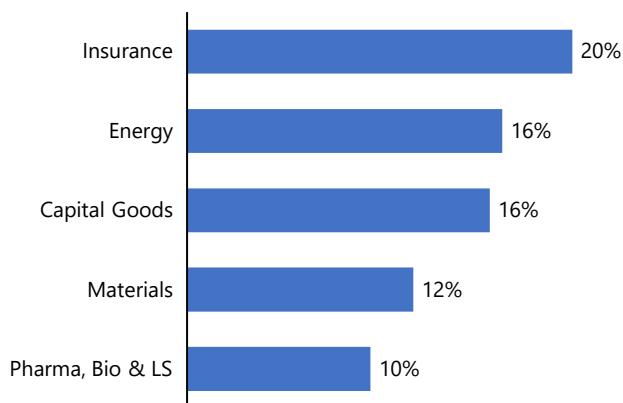
Value Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Al Rajhi Bank	67.7	-1.6%	7.5	512.2
Aramco	27.6	0.5%	11.7	323.8
Saudi Arabian Mining	63.6	-5.5%	3.8	241.9
RASAN	147.5	4.9%	1.3	187.8
SULAIMAN ALHABIB	221.0	-4.7%	0.8	170.5

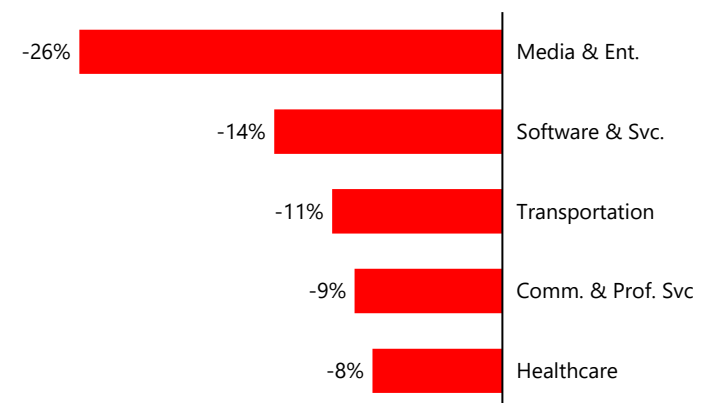
Volume Leaders – Companies

	Last Close	%Δ	Vol (mn)	Val (SAR mn)
Americana Res. Int PLC	2.0	-1.0%	41.6	84.0
Saudi Chemical	8.3	-2.5%	12.7	104.5
BATIC	2.3	-0.9%	12.0	28.0
Aramco	27.6	0.5%	11.7	323.8
SAUDI KAYAN	6.0	0.3%	11.2	66.8

Top Performers – Sectors YTD Performance



Top Laggards – Sectors YTD Performance



Source: Bloomberg

Source: Bloomberg

*Sourced from Bloomberg, based on earnings estimation for 2026.

International Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
MSCI (World)	4,647.1	-0.6%	20.0	4.9%
MSCI (EM)	1,648.6	2.9%	12.1	17.4%
US (S&P500)	7,200.8	-0.4%	21.6	5.2%
Nasdaq (CCMP Index)	25,067.8	-0.2%	27.3	7.9%
UK (FTSE 100)	10,363.9	-0.1%	13.1	4.4%
EURO (STOXX 600)	605.5	-1.0%	15.0	2.2%
GER (DAX)	23,991.3	-1.2%	15.6	-2.0%
JAP (NIKKEI 225)	59,513.1	0.4%	23.4	18.2%
CHN (SHCOMP)	4,112.2	0.1%	14.4	3.6%
Hong Kong (HSI)	26,095.9	1.2%	11.7	1.8%

Regional Markets

	Last Close	%Δ	Forward P/E (x)*	YTD %Δ
Saudi (TASI)	11,090.7	-0.9%	14.7	5.7%
Dubai (DFM)	5,779.9	0.2%	9.9	-4.4%
Abu Dhabi (ADX)	9,820.8	0.3%	10.5	-1.7%
Kuwait (KSE)	9,419.1	-0.2%	13.5	-0.8%
Qatar (QE)	10,564.6	0.3%	12.1	-1.8%
Oman (MSM)	8,397.7	0.4%	15.1	43.1%
Bahrain (BHBX)	1,974.3	0.1%	6.4	-4.5%
Egypt (EGX)	19,973.1	0.1%	52.3	14.6%
Lebanon (BSX)	1,819.5	1.1%	N/A	-7.4%
Morocco (MASI)	18,696.6	0.6%	19.3	-0.8%

Commodity Price

	Last Close	%Δ	MTD %Δ	YTD %Δ
WTI (USD/bbl)	106.4	4.4%	1.3%	85.3%
Brent (USD/bbl)	114.4	5.8%	0.4%	88.1%
US Natural Gas (USD/mmbtu)	2.9	3.1%	3.6%	-22.2%
Gold (USD/oz)	4,521.9	-2.0%	-2.1%	4.7%
Silver (USD/oz)	72.8	-3.4%	-1.3%	1.5%
Naphtha (USD/ton)	1,009.1	5.8%	7.8%	99.8%
Ethylene (USD/ton)	1,355.0	0.0%	-4.2%	85.6%
Urea (USD/ton)	907.5	0.0%	0.0%	131.2%
Sugar (USD/ton)	15.3	2.3%	4.9%	1.9%
Wheat (USD/ton)	629.5	0.8%	0.9%	24.2%
Cotton (USD/lb)	80.6	-1.6%	0.9%	25.4%
Aluminum (USD/ton)	3,522.0	1.4%	1.4%	17.6%

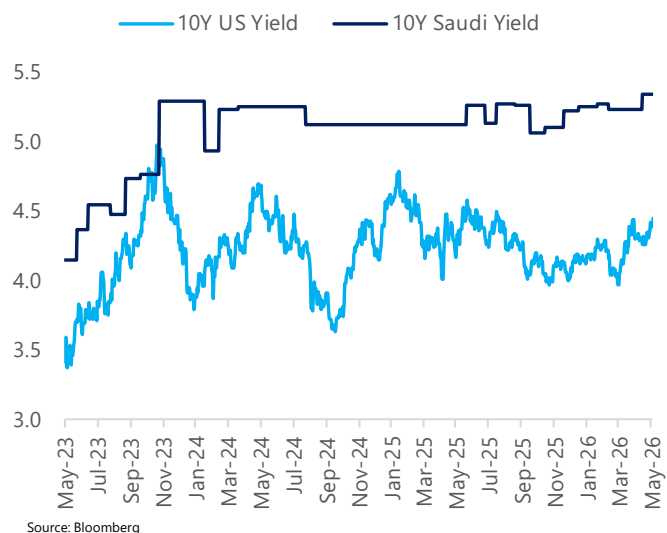
Interest Rates

	Last Close	DoD Δ	MTD Δ	YTD Δ
KSA SAIBOR 3M	4.69	2 bps	(1) bps	(17) bps
KSA SAIBOR 6M	5.18	(1) bps	(8) bps	(5) bps
SOFR 3M	3.67	(0) bps	(0) bps	(34) bps
SOFR 6M	3.76	(1) bps	(1) bps	(44) bps

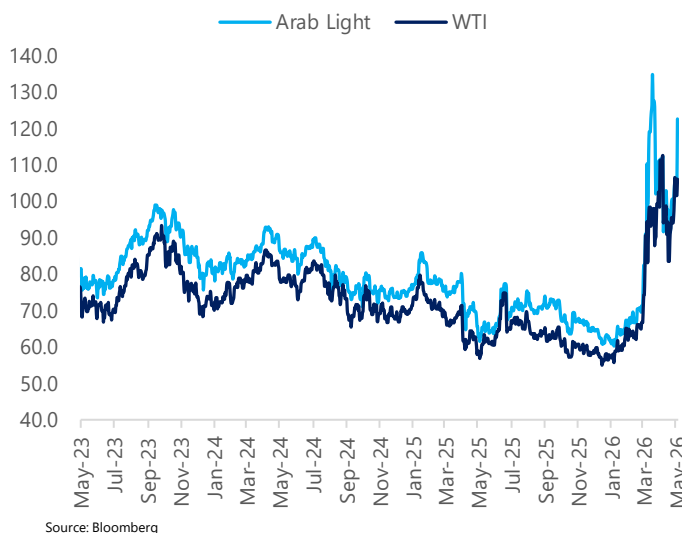
Currency (Per USD)

	Last Close	%Δ	MTD %Δ	YTD %Δ
SAR	3.75	0.0%	0.0%	0.0%
GBP	0.74	0.4%	0.5%	-0.4%
EUR	0.86	0.2%	0.3%	0.5%
JPY	157.24	0.1%	0.4%	0.3%
CHF	0.78	0.2%	0.3%	-1.1%
CNY	6.83	0.0%	0.0%	-2.3%

Bond Yield Rates (%)



Global Oil Price (USD/bbl)



*Sourced from Bloomberg, based on earnings estimation for 2026.

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