



TASI recorded an increase of 87.6 points (0.8%) during the week to close at 11,583.3. Saudi Automotive Services Co. was the top gainer increasing 17.1%, followed by Aldrees Petroleum and Transport Services Co. which rose 13.2%.

Market Performance	
Last Close - TASI	11,583.3
Index Change (points)	87.6
Index Change (%)	0.8%
Weekly Volume (bn)	1.7
Weekly Value (SR bn)	29.0
Market Cap (SR tn)	9.4

The week in review:

TASI closed at 11,583.3, recording an 87.6 points increase during the week. Trading volume reached 1.7 bn shares with a value traded of SAR 29.0 bn.

Among sectors, the Consumer Discretionary Distribution & Retail was the top-gainer, rising 5.3% WoW, followed by Capital Goods, which rose 3.3% during the week. On the other hand, Food & Beverages and Real Estate Mgmt & Dev't were the top decliners, each posting a 1.3% decline on WoW basis.

During the week, Saudi Automotive Services Co. (SACO AB) was the top performer, increasing 17.1%, followed by Aldrees Petroleum and Transport Services Co. (ALDREES AB) with a gain of 13.2%. However, among the top laggards, CHUBB Arabia Cooperative Insurance Co. (ACE AB) fell 6.9%, followed by Emaar The Economic City (EMAAR AB), declining 5.7%, on WoW basis.

Key events during the week:

- Saudi Arabia's Industrial Production Index (IPI) rose 7.1% YoY in August to 114.17 points, from 106.57 points a year earlier, according to the data released by GASTAT.

The week ahead:

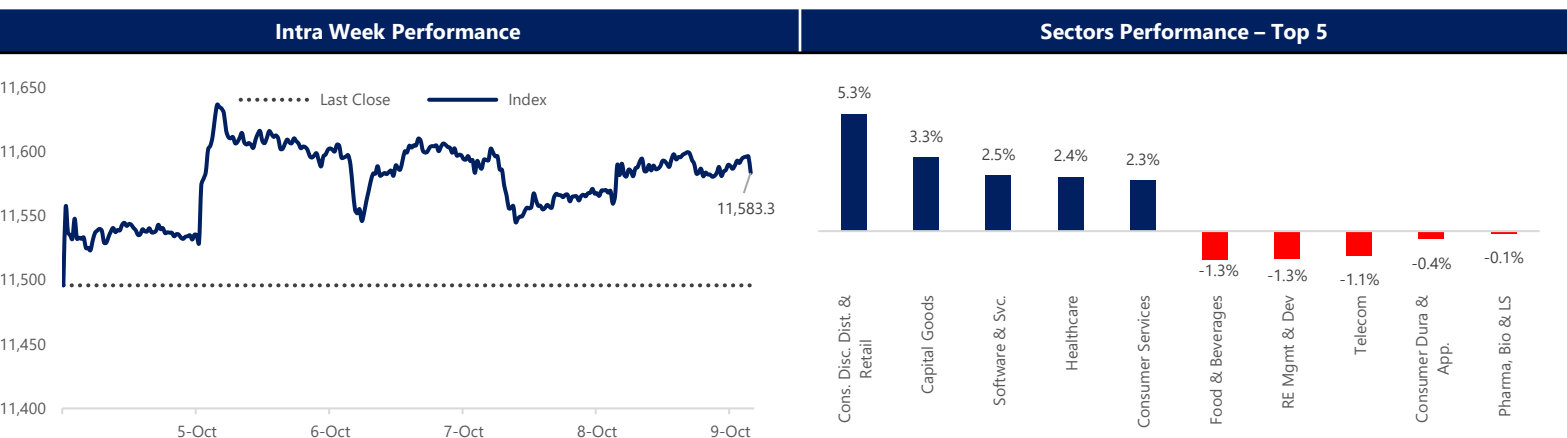
- 10/14/2025:** US Fed Chair Powell Speech
- 10/15/2025:** KSA CPI
- 10/15/2025:** US CPI

*Sourced from Bloomberg, based on forward estimations for the current year.

Index Returns								Valuations*		
	Last Close	WoW%Δ	MTD %Δ	YTD %Δ	1 year %Δ	3 year. Cum. %Δ		P/E (x)	P/B (x)	Div. Yield (%)
Tadawul All Shares Index	11,583.3	0.8	0.7	-3.8	-2.9	0.0		17.4	2.3	3.7
MSCI World	4,237.7	-2.3	-1.6	14.3	14.2	20.9		22.6	3.7	1.7
MSCI EM	1,365.7	-0.6	1.5	27.0	18.0	15.6		15.8	2.0	2.4
S&P 500	6,552.5	-2.4	-2.0	11.4	13.4	22.0		24.8	5.1	1.2
FTSE 100	9,427.5	-0.7	0.8	15.3	14.4	10.6		14.2	2.2	3.3
EURO STOXX 600	564.2	-1.1	1.1	11.1	8.7	13.1		16.0	2.1	3.2
DAX	24,241.5	-0.6	1.5	21.8	26.2	25.5		17.7	2.0	2.5
NIKKEI 225	48,088.8	5.1	7.0	20.5	22.1	21.0		22.7	2.4	1.7
SHCOMP	3,897.0	0.4	0.4	16.3	18.0	9.4		15.3	1.4	2.7
Nasdaq (CCMP Index)	22,204.4	-2.5	-2.0	15.0	21.5	28.2		30.4	8.1	0.7

Top Performers					Top Laggards				
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ		Last Close	WoW %Δ	MTD %Δ	YTD %Δ
SASCO	65.2	17.1	15.6	2.6	CHUBB	39.0	-6.9	-2.0	-21.2
ALDREES	142.0	13.2	13.3	18.1	Emaar EC	13.1	-5.7	-5.5	-30.8
MARAFIQ	42.9	9.4	8.6	-21.7	SUMOU	38.6	-4.1	-4.1	-17.9
TASHEEL	173.6	8.5	8.5	-3.6	GAS	16.2	-4.0	-5.5	-4.0
OBEIKAN GLASS	36.2	8.2	7.9	-4.8	CHEMANOL	10.4	-4.0	-3.8	-43.8

Volume Leaders					Value Leaders				
	Last Close	WoW %Δ	Avg. Vol (mn)	Avg. Val (SR mn)		Last Close	WoW %Δ	Avg. Vol (mn)	Avg. Val (SR mn)
PETRO RABIGH	7.9	1.0	80.2	565.4	PETRO RABIGH	7.9	1.0	80.2	565.4
AMERICANA	2.1	3.0	33.5	68.4	Al Rajhi Bank	107.5	2.1	2.9	309.3
BATIC	2.3	0.4	24.6	57.3	ARAMCO	24.8	0.4	7.1	176.9
TECO	0.9	0.0	16.7	15.6	ACWA Power	214.1	2.3	0.8	173.0
SPORT CLUBS	10.9	2.6	11.3	124.4	Alinma Bank	26.6	-0.9	5.2	139.6





NOMU ended the week up by 499.3 points (2.0% WoW), closing at 25,805.4. Twareat Medical Care Co. and Mohammed Hadi Al Rasheed and Partners Co. were the top performers, increasing by 23.1% and 21.6%, respectively.

Market Performance	
Last Close - NOMU	25,805.4
Index Change (points)	499.3
Index Change (%)	2.0%
Weekly Volume (mn)	30.5
Weekly Value (SR mn)	235.5
Market Cap (SR bn)	46.9

The week in review:

The NOMU Parallel Market ended the week at 25,805.4 points, reflecting an increase of 499.3 points (2.0%) WoW. Total trading volume reached 30.5 mn shares, with traded value of SAR 235.5 mn.

Twareat Medical Care Co. (TMC AB) led the gain with an increase of 23.1%, followed by Mohammed Hadi Al Rasheed and Partners Co. (ALRASHEE AB), which rose by 21.6% during the week.

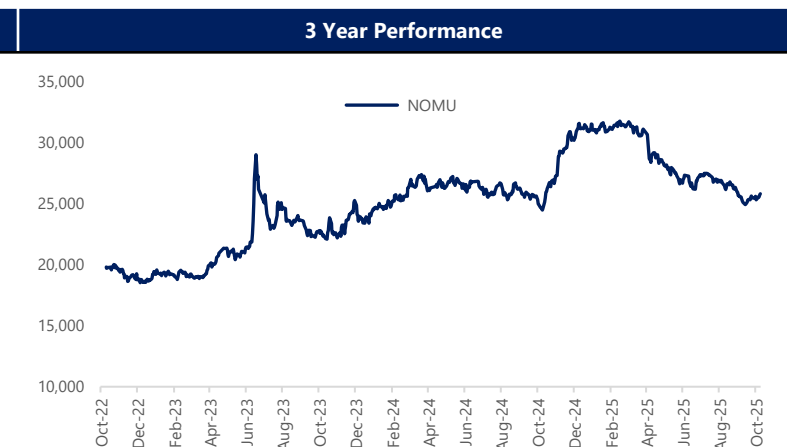
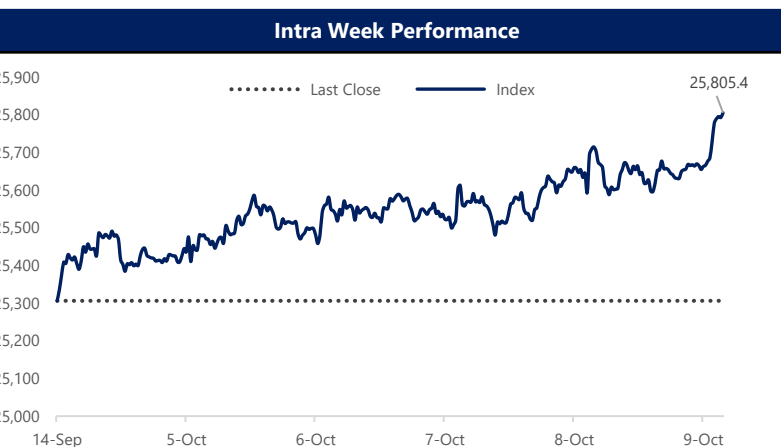
On the other hand, Mayar Holding Co. (MAYAR AB) was the top laggard, down 13.1% WoW, followed by Leaf Global Environmental Services Co. (LEAF AB), which fell 10.2% on weekly basis.

Top Performers				
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ
Twareat Medical	16.7	23.1	26.8	39.5
ALRASHEED	130.0	21.6	18.2	30.0
MOBI Industry Co.	13.9	15.6	20.6	-9.3
Shmoh Almadi Co.	13.4	11.4	11.4	-39.1
TIBBIYAH	32.6	11.3	20.0	-18.5

Volume Leaders				
	Last Close	WoW %Δ	Avg. Vol (mn)	Avg. Val (SR mn)
Canadian Medi.	9.0	11.1	1.5	12.6
Future Care	2.3	-8.7	1.4	3.4
Ladun Invest.	2.7	8.8	0.6	1.7
Alwasail Indust.	4.0	8.9	0.6	2.2
Dar Almarkabah	1.6	8.0	0.3	0.4

Top Laggards				
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ
MAYAR	2.5	-13.1	-16.3	-25.1
LEAF	44.9	-10.2	-10.2	-58.1
Al-Razi Medi.	33.4	-9.7	-10.9	-43.4
FUTURE CARE	2.3	-8.7	-12.8	-77.7
Alhasoob Co.	40.0	-8.7	-10.1	-34.4

Value Leaders				
	Last Close	WoW %Δ	Avg. Vol (mn)	Avg. Val (SR mn)
Canadian Medi.	9.0	11.1	1.5	12.6
Future Care	2.3	-8.7	1.4	3.4
Alwasail Indust.	4.0	8.9	0.6	2.2
Qomel Co.	49.0	-2.5	0.0	2.1
Alwaha REIT	9.5	-2.1	0.2	1.9



GLOBAL DATA SNAPSHOT

Commodity Prices						
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ	1 year %Δ	3 year %Δ
WTI (USD/bbl)	58.9	-3.3	-5.6	-17.9	-22.3	-35.4
Brent (USD/bbl)	62.7	-2.8	-6.4	-16.0	-21.0	-34.8
Arab light (USD/bbl)	66.8	-0.6	-4.8	-13.6	-15.0	-34.7
US Natural Gas (USD/mmbtu)	3.1	-6.6	-6.0	-14.5	16.1	-51.7
Gold (USD/oz)	4,017.8	3.4	4.1	53.1	52.8	140.8
Silver (USD/oz)	50.1	4.5	7.5	73.5	60.9	155.8

Interest Rates						
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ	1 year %Δ	3 year %Δ
KSA SAIBOR 3M	5.2	-0.1	0.1	-0.3	-0.4	0.7
KSA SAIBOR 6M	5.4	0.1	0.1	-0.1	0.0	0.5
KSA SAIBOR 12M	5.2	0.0	0.0	-0.1	0.0	-0.2
US Repo Rate	4.3	0.0	0.0	-0.3	-0.8	1.0
SOFR 3M	4.3	0.0	0.0	-0.4	-0.9	2.1
SOFR 6M	4.4	0.0	0.0	-0.7	-1.0	2.8

Currency per USD						
	Last Close	WoW %Δ	MTD %Δ	YTD %Δ	1 year %Δ	3 year %Δ
SAR	3.8	0.0	0.0	-0.1	-0.1	-0.2
GBP	0.7	0.9	0.6	-6.3	-2.3	-17.2
EUR	0.9	1.1	1.0	-10.9	-5.9	-16.5
JPY	151.2	2.5	2.2	-3.8	1.8	3.8
CHF	0.8	0.5	0.4	-11.9	-6.7	-20.0
CNY	7.1	0.2	0.2	-2.2	0.8	-0.3

Tadawul All Share Index



Two consecutive weeks of sustaining support above the 40-wema (11,312) is a positive sign for a short-term turnaround. While the recent decline has been from 12,536-10,366, the overall decline is from 12,883 – 10,366, which has corrected 50% at 11,624 and is now looking towards 11,921 (61.8%). Further potential in the coming weeks would then look to test the resistance line coming around 12,200.

Support is now defined around the 40-wema. Another key feature of support is the ability to regain above 11,500. This was the area that led towards 10,366 when it was penetrated in May this year. Before this downward break, 11,500 was a key support.

TASI Performance	
Index Level	11,583.3
Change WoW (%)	0.8%
Weekly Volume (bn)	1.7
Weekly Value (SR bn)	29.0
Market Cap (SR tn)	9.4

SASCO (65.15)

The decline from 91.40 – 49.02 witnessed its first sign of a turnaround after price surged above the 200-dema (59.91) and the bearish trend-line around 61.00.

This price action has corrected the downtrend by 38.2% at 65.20. The recovery would now look towards 70.20 and 75.20 with support looking to hold onto the 200-dema.



CARE (181.70)

After months of consolidating in a sideways trend between 139.20 – 180.00, price has just started to hold above the resistance. Support around the averages has already developed.

The targeted upside for this breakout is placed around 220.00 which in turn would also enable a retest of the peak area from 220.00 – 227.00.



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