19 August 2026

Daily Report

Domestic Market News

- **KSA's** holdings of US Treasuries rose to USD 142.5bn in June 2026. Long-term treasuries accounted for 76% of total. It maintained the 17th ranking among largest holders. (Source: Argaam)
- **Naseej** signed SAR 4.0mn contract to supply and install advanced technology solutions for the management of a public library in the city of Rabat. This 26 month contract is expected to have financial impact appearing over FY26-28. (Source: Tadawul))
- **Altwijri** obtained credit facilities worth SAR 5.5mn from SNB, to finance its future projects and also to issue letters of credit. (Source: Tadawul)
- **Saudi Ceramics** announced a fire incident at one of its electrical substations supplying one of it's tile production lines in Riyadh. It has comprehensive insurance coverage for the affected property and will soon announce any material financial impact. (Source: Tadawul)
- **Cenomi Centers** signed a promise to lease agreement with Saudi Downtown for leasing and operation of the shopping mall within Al Madinah Downtown Project for a period of 25 years. (Source: Tadawul)
- **Purity** signed a contract worth SAR 9.2mn 267.9mn to provide maintenance, operation, and cybersecurity support services for the Emirate of Qassim Region. Financial impact to appear over FY26-27. (Source: Tadawul)

Market Analysis

The **Saudi Stock Exchange** stayed flat at 10,912 points. The value traded stood at SAR 4.9bn (up 13.6% over the previous day), while the advance decline ratio stood at 96/160. The parallel market index increased 0.3% to 21,584 points. The value traded stood at SAR 29.1mn (up 154.5% over the previous day). Most of the sectors in main market ended in the red. Healthcare and Materials (up 1.4% and 1.0%, respectively) increased the most. While REITs and Software & Services (down 1.3% and 1.1%, respectively) decreased the most. Followed by Retailing and Capital Goods (down 1.0% and 0.9%, respectively).

Top Gainers

Company	Price	Change%
CHEMANOL	30.24	10.0
ALETIHAD	8.22	7.5
CENOMI RETAIL	15.36	7.4
LUBEREF	137.50	3.7
TASNEE	9.40	3.6

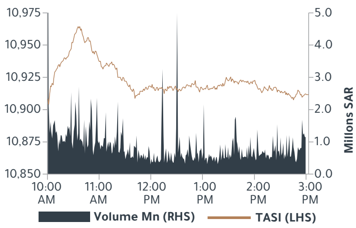
Top Losers

Company	Price	Change%
RAYDAN	16.80	-4.6
JARIR	16.59	-4.3
MIS	291.00	-3.9
SEDCO CAPITAL REIT	7.33	-3.3
CHEMICAL	7.80	-2.7

Saudi Stock Exchange

Index	Closing	High	Low	Daily Change%	YTD %
TASI	10,912	10,967	10,898	0.0	4.0
NomuC	21,584	21,612	21,494	0.3	(7.4)

TASI movement during session



TASI Ratios

P/E* (x)	18.4
Price-to-Book (x)	2.0
Dividend Yield (%)	3.1
Return on Equity (%)	17.7

*Source: Argaam (Excluding Aramco & before unusual items)

Index	Close	Daily Change%	YTD %	PE (TTM)
Energy	5,095	0.3	12.1	16
Materials	5,125	1.0	3.7	Neg
Capital Goods	14,828	-0.9	-0.7	17
Commercial Service	3,789	-0.5	-6.1	18
Transportation	4,084	-0.4	-17.3	20
Consumer Durables	3,491	-0.3	-1.3	Neg
Consumer Services	3,414	0.3	-3.1	29
Media	8,422	-0.1	-48.0	Neg
Consumer Discretionary Ret	7,483	-1.0	0.6	21
Consumer Staples Ret	5,299	0.4	-7.1	19
Food & Beverages	4,626	0.1	6.4	17
Healthcare	9,052	1.4	-8.3	27
Pharma & Bio Tech	4,584	-0.1	4.8	19
Banks	12,827	-0.3	4.7	11
Financial Services	4,895	-0.3	-9.4	28
Insurance	8,833	-0.3	18.6	33
Telecom	8,728	0.1	-0.4	14
Utilities	7,392	-0.1	1.5	15
REITs	2,886	-1.3	-1.2	37
Real Estate	3,037	-0.3	5.5	18
Software & Services	52,182	-1.1	-10.2	21

Average Index Value

Average days 5	Average days 10	Average days 20	Average value traded for the month (bn)
10,881	10,857	10,797	4.8

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000)
Current Week	12.7	723.60	1,321.60
Previous week	22.9	1,218.30	2,409.80

Top Weighted Companies

Company	Price	Change%
Saudi Aramco	26.58	0.2
Al Rajhi	64.40	-0.4
SNB	41.68	-0.5
Maaden	66.00	1.9
STC	43.70	0.2

19 August 2026

Daily Report

aljazira capital الجزيرة كابيتال

International Market News

- **US** pending home sales index slumped by 2.3% to 71.2 in July after falling 4.8% to 72.9 in June. Economists expected it to jump 1.4%. (Source: CNBC)
- **US** industrial production rose slightly less than expected in July. It crept up by 0.2% in July after climbing by an upwardly revised 0.3% in June. Economists expected it to increase by 0.3%. (Source: Reuters)
- After reporting a spike in new residential construction in **US** in June, the housing starts plummeted by much more than expected in July. It nosedived by 12.4% to an annual rate of 1.2mn in July after skyrocketing by 19.7% to 1.4mn in June. (Source: RTT News)
- **US** import prices fell by 0.4% in July following a revised 0.3% decrease in June. Economists expected it to inch up by 0.1% compared to 0.3% rise. The annual rate of import price growth slowed to 5.9% in July from 7.1% in June. (Source: CNBC)
- **UK's** unemployment rate came in at 4.9% in Q2-26 and was unchanged from Q1-26. The number of vacancies decreased 6,000 to 707,000 in the three months to July as firms reduced recruitment due to rising labor costs. (Source: Reuters)
- **Oil prices** gained 0.2% after US says that no talks going on with Iran.
- **Gold prices** fell 1.9% due to elevated US Treasury yields and higher oil prices.

Regional Markets

Market	Close	Daily Change%	MTD %	YTD %	P/E
Saudi Arabia	10,912	0.0	3.0	4.0	18.4
Dubai (DFM)	5,858	0.0	1.1	-3.1	9.0
Abu Dhabi (ADX)	10,098	0.2	1.9	1.1	17.4
Kuwait (KSE)	9,211	-0.0	-0.1	-3.0	19.4
Qatar (QE)	9,848	-0.4	-0.7	-8.5	11.9
Oman (MSM)	7,550	0.1	3.7	28.7	13.7
Bahrain (BSE)	1,947	-0.3	-0.5	-5.8	16.0
Egypt (EGX30)	55,277	-0.2	3.4	32.1	9.8

International Markets

Index	Close	Daily Change%	MTD %	YTD %	P/E
Dow Jones	53,343	-0.2	1.6	11.0	24.8
Nasdaq	26,290	-1.3	3.6	13.1	126.1
S&P 500	7,692	-0.7	2.7	12.4	28.3
FTSE 100	10,728	0.1	-1.3	8.0	14.8
Germany DAX 30	26,128	-0.8	1.9	6.7	17.4
France CAC 40	8,509	-0.8	-0.0	4.4	18.0
Japan Nikkei 225	67,461	-2.5	4.8	34.0	22.0
Brazil IBOVESPA	166,335	-0.3	-6.6	3.2	10.0
Hong Kong Hang Seng	25,471	0.1	-1.6	-0.6	13.3
South Korea KOSPI	6,870	0.8	4.2	63.0	18.7
China Shanghai Composite	3,990	0.2	4.1	0.5	20.0
Australia ASX 200	9,070	-0.0	1.0	4.1	22.0
India Sensex	77,235	-0.6	-1.1	-9.4	21.2
MSCI EM	1,695	-0.9	1.7	20.7	15.9
MSCI World	4,971	-0.7	2.5	12.2	25.6

Currency/ Cryptocurrency

Currency / USD	Close	Daily Change%	MTD %	YTD %
Dollar Index	99.7	0.0	-0.3	1.4
Euro	1.2	-0.0	0.4	-1.4
Japanese Yen	159.6	0.1	1.4	1.9
Sterling Pound	1.4	-0.1	0.4	0.4
Canadian Dollar	0.7	-0.2	0.9	-1.2
Swiss Franc	1.2	-0.2	-0.6	-2.4
Australian Dollar	0.7	-0.2	1.0	6.2
Chinese Yuan	6.7	0.0	-0.1	-3.3
Indian Rupee	95.7	0.1	0.3	6.5
Bitcoin	64,551.6	0.3	2.6	-26.4
Ethereum	1,912.0	0.4	2.8	-35.8
Ripple	1.0	-0.3	-5.8	-45.6

Commodity Markets

Commodity	Price	Daily Change%	MTD %	YTD %
Arab Light Crude ($/bbl)	84.6	2.0	-5.1	37.0
Brent Crude ($/bbl)	91.0	0.2	1.0	49.6
Texas crude ($/bbl)	84.9	0.5	0.3	47.9
Natural Gas ($/mmbtu)	2.8	3.2	1.1	-25.3
Gold ($/oz)	4,334.5	-1.8	7.1	0.4
Silver ($/oz)	63.4	-3.7	10.0	-11.6
Steel ($/ton)	1,196.0	0.0	0.4	27.9
Iron Ore (CNY/MT)	721.0	-0.1	2.1	-10.7
Aluminum($/MT)	3,220.5	-1.4	1.1	7.5
Copper ($/MT)	13,986.5	-1.2	1.4	12.6
Sugar ($/lb)	17.5	3.6	19.2	16.3
SMP* (EUR/MT)	2,888.0	0.3	0.5	44.4

SMP: Skimmed Milk Powder*

Corporate Calendar

Date	Company	Event
19-Aug	**ALAMAR**	Eligibility of Cash Dividend
19-Aug	**ARAMCO**	Eligibility of Cash Dividend
20-Aug	**EPCCO**	Cash Dividend Distribution
20-Aug	**RAWASI**	Cash Dividend Distribution
20-Aug	**STC**	Cash Dividend Distribution
20-Aug	**FOURTH MILLING**	Eligibility of Cash Dividend
20-Aug	**ALBILAD**	Cash Dividend Distribution
20-Aug	**EXTRA**	Cash Dividend Distribution

EGM: Extra Ordinary Meeting*
OGM: Ordinary General Meeting*

Interbank Rates

Region	Rate	Daily Change(bps)	MTD (bps)	YTD (bps)
KSA (SAIBOR 1M)	4.581	-1.90	-8.2	-18.7
KSA (SAIBOR 3M)	4.749	0.66	-12.0	-11.0
KSA (SAIBOR 6M)	5.317	7.38	13.3	9.1
KSA (SAIBOR 12M)	4.979	-0.59	3.1	-10.4
USA (SOFR 3M)	3.723	-0.51	-2.8	7.1
UAE (EIBOR 3M)	3.952	-0.54	1.2	47.7

Data Sources: Tadawul, Bloomberg, Reuters
Closes as of Aug 18 2026

19 August 2026

Daily Technical Outlook

Technical observations

Index	TASI
Ticker	SASEIDX Index
Last Close	10,912
Short-term view	Buy
weeks high/low 52	11,782 - 10,194

Market data

Exchange Market Cap. (SAR bn)	9,592.0
Value (SAR mn)	4,915.8
Volume (mn)	275.1
Number of Transactions	502,719
Market Breadth	96 : 160

Key statistics

1D return %	0.03%
MTD return %	3.04%
QTD return	-3.00%
YTD return	4.01%
ADT vol. 3M* (mn)	229.3
ADT val. 3M (SARmn)	4,496.0

*ADT stands for Average Daily Traded

TASI market commentary

- TASI experienced a marginal rise on Tuesday, driven by the advance of Materials and Energy sectors. At close, the Saudi market ended the day with a change of 0.03% at 10,912. In terms of activity, total volumes and value traded were ~275mn and ~SAR 4.9bn, respectively. The advance-decline ratio came in at 96/160.

Technical outlook

- TASI closed the last session near 10,912, registering an increase of 4 points. The index experienced a coiled session after the penetration of the 50-day SMA near 10,865. Nevertheless, as long as the index remains above the 20-day SMA near 10,795, a potential upside target near 11,150 would stay achievable. TASI formed a Doji candlestick, depicting the current temporary near-term balance between buying and selling attitudes. Moreover, the RSI indicator continued hovering above the level of 50 as well as the previously penetrated declining trendline. TASI has an immediate support level is seen around 10,860. If breached, the subsequent support levels would be around 10,795 - 10,680. On the other hand, an immediate resistance level around 11,025. If successfully surpassed, the subsequent resistance levels to watch for would be around 11,090 - 11,150. Traders are advised to buy and closely monitor the significant resistance of around 11,150, as penetrating it decisively could induce additional buying attitudes.

Key price levels

S3	S2	S1	Pivot	R1	R2	R3
10,680	10,795	10,860	10,910	11,025	11,090	11,150

SAR 9,592bn Market cap

3.14% (%) D/Y

1.96x P/B

17.68% ROE

18.43x TTM P/E

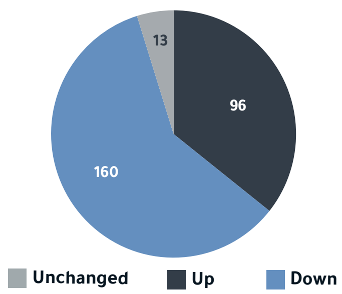
Source: Bloomberg, Argaam

TASI daily chart

Source: Tradingview, Aljazira Capital Research

Our view

Market depth



SAUDI MARKET - TOP PICKS FOR THE DAY

Code	Company	Close*	Buy range	Sell range	Reward %	Stop loss
No stocks recommendations due to market volatility						

*As of 18th Aug 2026

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RESEARCH DIVISION

AlJazira Capital, the investment arm of Bank AlJazira, is a Shariaa Compliant Saudi Closed Joint Stock company and operating under the regulatory supervision of the Capital Market Authority. AlJazira Capital is licensed to conduct securities business in all securities business as authorized by CMA, including dealing, managing, arranging, advisory, and custody. AlJazira Capital is the continuation of a long success story in the Saudi Tadawul market, having occupied the market leadership position for several years. With an objective to maintain its market leadership position, AlJazira Capital is expanding its brokerage capabilities to offer further value-added services, brokerage across MENA and International markets, as well as offering a full suite of securities business.

RATING TERMINOLOGY

1. Overweight: This rating implies that the stock is currently trading at a discount to its 12 months price target. Stocks rated "Overweight" will typically provide an upside potential of over 10% from the current price levels over next twelve months.
2. Underweight: This rating implies that the stock is currently trading at a premium to its 12 months price target. Stocks rated "Underweight" would typically decline by over 10% from the current price levels over next twelve months.
3. Neutral: The rating implies that the stock is trading in the proximate range of its 12 months price target. Stocks rated "Neutral" is expected to stagnate within +/- 10% range from the current price levels over next twelve months.
4. Suspension of rating or rating on hold (SR/RH): This basically implies suspension of a rating pending further analysis of a material change in the fundamentals of the company.

Disclaimer