

Daily Market Report

03 January 2023

JSE

JSE All-Share Index was closed on Monday on account of New Year's Day.

BRVM

BRVM Composite Index climbed by 1.54% and closed at 206.34 points on Monday, with Servair Abidjan Côte d'Ivoire and Orange Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was closed on Monday on account of New Year's Day.

EGX

EGX 30 Index surged by 2.48% and closed at 14,960.66 points on Monday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index was up by 0.11% to close at 805.93 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	↔	0.00%
BRVM Bourse Régionale des Valeurs Mobilières	▲	1.54%
NGX Nigerian Stock Exchange	↔	0.00%
EGX Egyptian Stock Exchange	▲	2.48%
ESG Casablanca Stock Exchange	▲	0.11%

African Markets

Nigeria: NGX 30 Index was closed on Monday on account of New Year's Day.

Egypt: EGX 30 Index surged by 2.48% and closed at 14,960.66 points on Monday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index was closed on Monday on account of New Year's Day.

South Africa: JSE Top 40 Index was closed on Monday on Account of New Year's Day.

Nigeria Key Indicators

	Current
Inflation	21.47%
Exchange Rate	₦ 449.05
INTERBANK RATES	
OPR	11.75 ↔
Overnight	11.33 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.41% to close at 10252.72 points on Monday, as gains in the Telecommunications, Real Estate, and Financials sectors led shares higher. MSCI UAE increased by 0.74% to close at 414.72 points.

Vietnam: VN-30 Index was closed on Monday on account of New Year's Day.

Saudi Arabia: Tadawul All Share Index increased by 0.30% to close at 10,578.34 points on Monday, as gains in the Capital Goods, Retailing, and Real Estate Mgmt & Dev't sectors led shares higher. MSCI Saudi Arabia increased by 0.10% to close at 1,473.12 points.

India: Nifty 50 Index increased by 0.51% to close at 18,197.45 points on Monday, as gains in the Bank, IT, and Financial Services sectors led shares higher. MSCI India increased by 0.43% to close at 2,077.49 points.

News

Nigeria:

Diri signs N389bn budget, Contributory Pension Bill
DMBs, Merchant Banks Borrowed N11.01trn from CBN in 2022
Nigeria's Agricultural Sector Surged by 18.33% in 9M22

Kenya:

Increased fuel, fertiliser imports push Q3 trade deficit up 16%
KRA nets Sh9.07 billion in tax amnesty initiative
Construction slows to 4.3pc as raw material demand softens

Abu Dhabi:

Adnoc to take Mubadala's 25% stake in Austrian petchem firm
Dubai Duty Free sales hit \$1.73bn in 2022 as travel rebounded
MBZUAI boosts UAE ambitions for global AI prominence

Saudi Arabia:

Saudi Arabia's exports surge to \$146.32bln
Saudi announces new shipping service to connect Jubail Port with 11 global ports
Saudi Arabia's ICT market value hit \$40.9bn in 2022

Egypt:

FRA amends regulations for MSMEs' finance
Egypt revokes letters of credit requirement for imports
EBECO management approves EGP 1.14 bln capital increase through IPO

South Africa:

SA posts trade surplus in November
SA private sector credit up 8.30% y/y in November
Central Energy Fund fires into the LPG sector with Avedia stake

India:

GST receipts in December up 15% year-on-year at Rs 1.49 lakh crore
India raises windfall tax on crude, diesel, aviation fuel
Bond yields rise on elevated Jan-March state debt sale plan
Vietnam:
Ho Chi Minh City attracts 3.94 bn USD in FDI in 2022
Hanoi attracts nearly 1.7 bn USD in FDI in 2022
Textile-garment targets up to 48 bn USD in 2023 export turnover

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,252.72	0.4%	0.4%	0.4%	0.4%	AED/USD	3.67	0.0%	0.0%
Egypt	14,960.66	2.5%	2.5%	2.5%	2.5%	EGP/USD	24.67	-0.3%	-0.4%
India	18,197.45	0.5%	0.5%	0.5%	0.5%	INR/USD	82.71	0.0%	0.0%
Kenya	1,676.10	0.0%	0.0%	0.0%	0.0%	KES/USD	123.41	-0.1%	-0.1%
Nigeria	1,842.50	0.0%	0.0%	0.0%	0.0%	NGN/USD	448.08	0.0%	0.0%
Saudi Arabia	10,578.34	0.3%	1.0%	1.0%	1.0%	SAR/USD	3.76	0.0%	0.0%
South Africa	66,955.47	0.0%	0.0%	0.0%	0.0%	ZAR/USD	17.01	-0.1%	-0.1%
Vietnam	1,005.19	0.0%	0.0%	0.0%	0.0%	VND/USD	23,635.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	472.29	-0.01%	-0.01%	-0.01%	-0.01%	Brent Crude (\$)	85.64	-0.3%	-0.3%
MSCI Frontier 100	1,090.19	-0.04%	-0.04%	-0.04%	-0.04%	Gold (\$)	1,835.80	0.5%	0.5%
MSCI Emerging	956.12	-0.03%	-0.03%	-0.03%	-0.03%	Copper (\$)	8,372.00	0.0%	0.0%
MSCI World (USD)	2,607.25	0.2%	0.2%	0.2%	0.2%	Coffee (\$)	156.17	-1.6%	0.0%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Presco	137.50	10.0%	0.0%	1611.07	UACN	10.25	-7.7%	0.0%	6.40
Airtel Africa	1635.00	9.9%	0.0%	350.08	Ecobank	10.60	-6.2%	0.0%	5.87
FCMB	3.85	8.8%	0.0%	20.32	Fidelity	4.35	-4.6%	0.0%	6.20
Wema	3.90	8.3%	0.0%	15.23	UBA	7.60	-3.2%	0.0%	28.01
Unilever	11.60	0.9%	0.0%	4.63	Access	8.50	-2.3%	0.0%	1518.28
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.90	3.90	0.0%	15.23	Unilever	11.60	10.50	10.5%	4.63
Total	193.00	193.00	0.0%	3.24	Cap	17.80	15.25	16.7%	0.05
Seplat Petroleum	1100.00	1100.00	0.0%	1117.30	Nascon	11.10	9.00	23.3%	0.14
P Z Cussons	11.35	11.35	0.0%	5.08	Sterling	1.40	1.13	23.9%	55.77
Presco	137.50	137.50	0.0%	1611.07	Guaranty	23.00	18.00	27.8%	188.81

*Market closed on 2/1

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Insurance House	0.88	15.0%	15.0%	0.00	Aram Group	2.04	-8.5%	-8.5%	0.01
Abu Dhabi National Hotels Co.	4.04	5.5%	5.5%	0.48	National Corp for Tourism & Hotels	2.81	-6.3%	-6.3%	0.02
Hayah Insurance Company	1.02	5.2%	5.2%	0.00	APEX INVESTMENT	3.36	-4.0%	-4.0%	2.69
Multiply Group	4.82	3.9%	3.9%	126.95	Q Holding	3.87	-3.3%	-3.3%	5.91
Borouge	2.62	3.6%	3.6%	56.55	Al Seer Marine Supplies & Equipment Co.	9.18	-2.6%	-2.6%	9.29
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Al Buhaira National Insurance Co.	2.55	2.55	0.0%	0.00	BURJEEL HOLDINGS	2.25	2.25	0.0%	19.46
Al Fujairah National Insurance Co.	210.00	0.00	0.0%	0.00	AL KHALEEJ Investment	0.75	0.75	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Alexandria Containers and goods	20.47	10.1%	10.1%	9.10	Ibsinsa Pharma	9.59	-2.0%	-2.0%	3.18
ELSWEDY ELECTRIC	25.45	9.5%	9.5%	74.27	Misr Fertilizers Production Company	95.79	-0.2%	-0.2%	1.70
GB AUTO	8.70	9.3%	9.3%	72.51					
Palm Hills Development Company	2.25	8.2%	8.2%	113.13					
Juhayna Food Industries	3.43	5.5%	5.5%	63.71					

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.97	2.97	0.0%	2.92	Commercial International Bank	8.60	8.60	0.0%	1.72
Telecom Egypt	24.73	24.73	0.0%	24.64	Egyptian Kuwaiti Holding	12.11	12.11	0.0%	32.96
T M G Holding	10.10	10.10	0.0%	9.95	Ezz Steel	5.36	5.36	0.0%	69.40
Sidi Kerir Petrochemicals	13.54	13.54	0.0%	13.08	Housing & Development Bank	2.21	2.21	0.0%	23.12
Palm Hills Development Co.	2.25	2.25	0.0%	113.13	Juhayna Food Industries	3.43	3.43	0.0%	63.71

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	119.10	5.7%	5.7%	16899.149	Divi's Laboratories Limited	3370.00	-1.3%	-1.3%	957.61
Hindalco Industries	486.50	2.8%	2.8%	5468.97	Asian Paints	3049.70	-1.2%	-1.2%	3090.00
ONGC	150.65	2.7%	2.7%	1440.00	Titan Company	2565.35	-1.2%	-1.1%	1799.96
Tata Motors	395.00	1.8%	1.8%	4139.32	Bajaj Auto	3574.90	-1.1%	-1.5%	1674.98
Icici Bank	902.90	1.4%	1.4%	3893.70	Hero Motocorp	2716.00	-0.8%	-0.8%	357.31

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Axis Bank	944.95	958.90	-1.5%	3284.11	Wipro	393.10	372.40	5.6%	1090.53
Jsw Steel	776.15	790.00	-1.8%	2604.77	Tech Mahindra	1010.00	943.70	7.0%	1361.72
State Bank Of India	612.60	629.55	-2.7%	4132.57	Tata Motors	395.00	366.20	7.9%	4139.32
Indusind Bank	1226.45	1275.80	-3.9%	3159.18	Tata Consultancy Svs.	3263.00	2926.10	11.5%	2308.91
Larsen & Toubro	2092.05	2211.60	-5.4%	1686.61	Kotak Mahindra Bank	1830.00	1631.00	12.2%	2054.07

Kenya*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup	3.01	6.0%	0.0%	0.09	Nation Media Group	15.95	-2.4%	0.0%	0.01
Stanbic Holdings	102.00	4.1%	0.0%	0.04	Bamburi Cement Limited	31.50	-2.2%	0.0%	0.10
Kenya Power & Lighting Limited	1.56	4.0%	0.0%	0.94	Equity Group Holdings	44.50	-1.7%	0.0%	137.26
Total Kenya Ltd	23.85	2.6%	0.0%	0.04	NCBA Group	39.35	-1.1%	0.0%	1.04
The Cooperative Bank of Kenya Ltd	12.30	2.1%	0.0%	0.94	Kenya Reinsurance Corporation Ltd	1.83	-1.1%	0.0%	0.04

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
NCBA Group	39.35	39.80	-1.1%	1.04	Kengen Limited	3.22	3.10	3.9%	0.36
Standard Chartered Bank Kenya Ltd	142.75	148.75	-4.0%	0.83	Nairobi Securities Exchange Plc	6.78	6.48	4.6%	0.14
East African Breweries Limited	167.50	174.75	-4.1%	1.99	Safaricom Plc	24.15	23.00	5.0%	337.11
Absa Bank Kenya	12.30	12.95	-5.0%	1.33	Nation Media Group	15.95	15.00	6.3%	0.01
Stanbic Holdings	102.00	108.00	-5.6%	0.04	Kenya Reinsurance Corporation Ltd	1.83	1.71	7.0%	0.04

*Market closed on 2/1

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Etiad Atheeb Telecommunication Co.	52.20	9.9%	11.2%	17.49	Derayah REIT Fund	9.98	-2.2%	-1.4%	9.86
Ash-Sharqiyah Development Co.	53.80	5.5%	8.7%	17.16	AlAhli REIT Fund 1	10.02	-2.2%	-0.8%	2.60
Alujain Holding Corp.	39.60	5.0%	6.3%	30.08	Tanmiah Food Co.	130.20	-2.1%	-0.8%	14.12
Wafrah for Industry and Development Co.	27.75	4.9%	8.4%	19.77	Saudi Arabia Refineries Co.	77.90	-1.9%	7.6%	107.79
Bawan Co.	31.60	4.6%	7.7%	23.25	Nahdi Medical Co.	168.40	-1.9%	0.7%	27.19
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Alamar Foods Co.	141.00	141.00	0.0%	4.49	Al Alamiya for Coop Insurance Co.	11.58	11.58	0.0%	1.37
Nahdi Medical Co.	168.40	168.40	0.0%	27.19	Al Kathiri Holding Co.	37.65	37.65	0.0%	15.90
Elm Co.	336.00	336.00	0.0%	19.05	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Saudi Tadawul Group Holding Co.	183.80	183.80	0.0%	47.82	Amana Coop Insurance Co.	9.18	9.18	0.0%	5.13
ACWA POWER Co.	156.60	156.60	0.0%	29.57	Anaam International Holding Group	21.40	21.40	0.0%	23.98

South Africa*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Investec Ltd	10750.00	1.7%	0.0%	9160.72	Gold Fields Ltd	17615.00	-4.5%	0.0%	11171.26
Investec PLC	10767.00	1.0%	0.0%	7969.84	Sibanye Stillwater Ltd	4472.00	-3.4%	0.0%	9570.08
FirstRand Ltd	6212.00	0.5%	0.0%	25344.96	AngloGold Ashanti Ltd	32923.00	-2.4%	0.0%	12635.85
Discovery Ltd	12335.00	0.3%	0.0%	7728.99	Anglo American Platinum Ltd	142488.00	-2.1%	0.0%	20888.74
					SPAR Group Ltd	11350.00	-1.3%	0.0%	2580.76
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn R)
Investec Ltd	10750.00	10750.00	0.0%	9160.72	SPAR Group Ltd	11350.00	11350.00	0.0%	2580.76
Investec	10767.00	10767.00	0.0%	7969.84	Clicks Group Ltd	27008.00	26993.00	0.1%	15745.66
Glencore	11404.00	12259.00	-7.0%	5790.27	Mr Price Group Ltd	15894.00	15422.00	3.1%	3058.64
British American Tobacco	67410.00	74444.00	-9.4%	62441.88	Aspen Pharmacare Holdings Ltd	13520.00	12889.00	4.9%	4897.76
The Bidvest Group Ltd	21439.00	23636.00	-9.3%	5179.23	Vodacom Group Ltd	12270.00	11562.00	6.1%	7248.75

*Market closed on 2/1

Vietnam*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Phat Dat Real Estate Development Corp	13600.00	1.5%	0.0%	116.954,86	Khang Dien House Trading & Investment	26500.00	-5.2%	0.0%	21.483,57
PetroVietnam Power Corp	10650.00	1.4%	0.0%	37.849,35	No Va Land Invest	14000.00	-4.4%	0.0%	151.128,57
Vietnam National Petroleum Group	31700.00	1.1%	0.0%	16.256,81	Bank for Inv. and Devp	38600.00	-3.5%	0.0%	103.592,92
Vietnam JSC Bank	27250.00	0.9%	0.0%	37.774,83	Saigon Beer Alcohol Beverage Corp.	166900.00	-3.5%	0.0%	28.450,07
FPT Corp	76900.00	0.9%	0.0%	48.071,46	Military Commercial Bank	17100.00	-1.7%	0.0%	71.562,54
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
Vinamilk	77000.00	87004.15	-11.5%	103.065,05	BaoViet Holdings	46500.00	46500.00	0.0%	21.477,70
Saigon Beer Alcohol Beverage Corp.	172900.00	197900.00	-12.6%	18.036,65	Vietnam Rubber Group	13800.00	13800.00	0.0%	9.309,83
Vietcombank	80700.00	96000.00	-15.9%	100.751,69	Ho Chi Minh City Devp	15900.00	15900.00	0.0%	21.798,89
Bank for Inv. and Devp	40000.00	49950.00	-19.9%	52.143,42	Mobile World Inv. Corp	42900.00	42900.00	0.0%	51.587,35
Petrovietnam Gas	102600.00	130442.43	-21.3%	10.043,56	No Va Land Invest	14650.00	14650.00	0.0%	324.527,33

*Market closed on 2/1

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