

Daily Market Report

04 January 2023

JSE

JSE All-Share Index climbed by 1.90% and closed at 74,436.48 points on Tuesday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index declined by 1.14% and closed at 203.99 points on Tuesday, with CIE Côte d'Ivoire and Orange Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.67% to close at 51,595.66 points on Tuesday, as the Banking, Consumer Goods and Insurance sectors recorded gains.

EGX

EGX 30 Index increased by 0.72% and closed at 15,068.13 points on Tuesday, as the market gained LE 8.3 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index was down by 0.16% to close at 804.68 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.90%
BRVM Bourse Régionale des Valeurs Mobilières	▼	1.14%
NGX Nigerian Stock Exchange	▲	0.67%
EGX Egyptian Stock Exchange	▲	0.72%
ESG Casablanca Stock Exchange	▼	0.16%

African Markets

Nigeria: NGX 30 Index increased by 0.64% to close at 1,854.23 points on Tuesday. UBA and UBN were the top gainers.

Egypt: EGX 30 Index increased by 0.72% and closed at 15,068.13 points on Tuesday, as the market gained LE 8.3 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index inched down by 0.04% and closed at 1,675.40 points on Tuesday. WPP Scangroup and Centum Investment Company were the top losers.

South Africa: JSE Top 40 Index surged by 2.10% and closed at 68,360.69 points on Tuesday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.47%
Exchange Rate	₦ 449.05
INTERBANK RATES	
OPR	9.50 ▼
Overnight	9.83 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.34% to close at 10,287.82 points on Tuesday, as gains in the Telecommunications, Real Estate, and Financials sectors led shares higher. MSCI UAE increased by 0.41% to close at 416.44 points.

Vietnam: VN-30 Index surged by 4.18% to close at 1,047.25 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam surged by 4.27% to close at 640.54 points.

Saudi Arabia: Tadawul All Share Index increased by 0.78% to close at 10,660.94 points on Tuesday, as gains in the Food & Staples Retailing, Retailing, and Diversified Financials sectors led shares higher. MSCI Saudi Arabia increased by 0.76% to close at 1,484.37 points.

India: Nifty 50 Index was up by 0.19% to close at 18,232.55 points on Tuesday, as gains in the Bank, IT, and Financial Services sectors led shares higher. MSCI India was up by 0.20% to close at 2,081.55 points.

News

Nigeria:

Fed Govt opens 2023 borrowings with two savings bonds
With Eyes on \$400m Fund, NNPC Pushes for Oil in Sokoto, Niger, Others
EFCC recovers N13bn illegal fuel subsidy payments

Kenya:

Kenya's Economy Grows by 4.7% in Q3 2022
Kenyan exporters earn billions in exchange gains in Q3
Kuramo Capital to buy Sh1bn TransCentury shares

Abu Dhabi:

National Bonds, Lulu Exch in partnership to promote savings habits, products
Ghabbour Auto okays selling 45% stake of its GB Lease to UAE-based Chimera
Flat6Labs, Wio Bank sign MoU to enhance SME-centric banking

Saudi Arabia:

Saudi Arabia's job numbers rise as PMI stays firm at 56.9
Saudi Arabia's new industrial licenses rise 5.1% in November
PIF-owned developer ROSHN signs \$1.6bn credit facilities with Saudi banks

Egypt:

Parliament greenlights ports development, oil exploration, green hydrogen bills
SCA, ABS ink MoU to boost environmental sustainability cooperation
Egypt's liquefied natural gas exports register 4.86M tons in Jan-Sept '22

South Africa:

Private-sector credit rises at slowest pace since August
South African rand steady with investor focus on Fed minutes
SA, Nigeria and Ghana are risks for Sub-Saharan Africa in 2023: Fitch

India:

Adani to roll out 5G for cos, apps for consumers
Manufacturing output at 13 - month high in December
HDFC Bank, Yes Bank tie up with Microsoft

Vietnam:

Vietnam enjoys 11.2 billion USD trade surplus
State budget collection up 15% in 2022
Dong Thap's exports post record high growth in 2022

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,287.82	0.3%	0.8%	0.8%	0.8%	AED/USD	3.67	0.0%	0.0%
Egypt	15,068.13	0.7%	3.2%	3.2%	3.2%	EGP/USD	24.76	0.1%	0.1%
India	18,232.55	0.2%	0.7%	0.7%	0.7%	INR/USD	82.79	0.1%	0.0%
Kenya	1,675.40	-0.04%	-0.04%	-0.04%	-0.04%	KES/USD	123.55	0.1%	0.0%
Nigeria	1,854.23	0.6%	0.6%	0.6%	0.6%	NGN/USD	448.55	0.1%	0.1%
Saudi Arabia	10,660.94	0.8%	1.7%	1.7%	1.7%	SAR/USD	3.76	0.0%	0.1%
South Africa	68,360.71	2.1%	2.1%	2.1%	2.1%	ZAR/USD	17.03	0.1%	0.1%
Vietnam	1,047.25	4.2%	4.2%	4.2%	4.2%	VND/USD	23,535.00	-0.4%	-0.4%

MSCI Emerging Markets

MSCI Frontier	479.19	1.5%	1.5%	1.5%	1.5%	Brent Crude (\$)	82.10	-4.1%	-4.4%
MSCI Frontier 100	1,110.19	1.8%	1.8%	1.8%	1.8%	Gold (\$)	1,846.10	0.6%	1.1%
MSCI Emerging	962.57	0.7%	0.6%	0.6%	0.6%	Copper (\$)	8,321.50	-0.6%	-0.6%
MSCI World (USD)	2,600.91	-0.2%	-0.1%	-0.1%	-0.1%	Coffee (\$)	157.31	0.7%	0.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBA	8.30	9.2%	9.2%	64.59	FCMB	3.51	-8.8%	-8.8%	6.85
UBN	6.95	8.6%	8.6%	3.75					
P Z Cussons	12.10	6.6%	6.6%	11.08					
Access	8.80	3.5%	3.5%	58.91					
FBNH	11.25	3.2%	3.2%	164.14					
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%	0.88	Unilever	11.60	10.50	10.5%	0.40
Total	193.00	193.00	0.0%	11.97	Cap	17.80	15.25	16.7%	1.13
Seplat Petroleum	1100.00	1100.00	0.0%	7.48	Nascon	11.10	9.00	23.3%	0.22
P Z Cussons	12.10	12.10	0.0%	11.08	Sterling	1.40	1.13	23.9%	2.48
Presco	137.50	137.50	0.0%	15.94	Guaranty	23.25	18.00	29.2%	318.21

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Corp for Tourism & Hotels	3.02	7.5%	0.7%	0.16	Gulf Cement Co.	0.49	-6.9%	-6.5%	0.03
Abu Dhabi National Energy Company	3.63	3.4%	5.8%	71.92	Abu Dhabi National Takaful Co.	6.10	-5.3%	-5.3%	0.04
Arkan Building Materials Company	1.68	3.1%	5.7%	27.90	Emirates Driving Co.	24.80	-4.6%	-6.8%	0.95
Abu Dhabi Aviation Co.	6.68	2.9%	2.8%	0.54	PALMS SPORTS	9.40	-4.1%	-4.1%	0.18
National Marine Dredging Co.	24.42	2.2%	-0.2%	22.02	Response Plus Holding	5.95	-3.3%	-3.9%	8.81
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	AL KHALEEJ Investment	0.75	0.75	0.0%	0.00
Al Fujairah National Insurance Co.	210.00	0.00	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	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£)
Juhayna Food Industries	3.61	5.3%	11.1%	113.72	Ibnsina Pharma	9.40	-2.0%	-4.0%	8.48
Oriental Weavers	2.11	4.7%	7.6%	92.32	Citadel Capital	5.28	-1.9%	-0.8%	0.93
GB AUTO	9.10	4.6%	14.3%	84.51	Cairo For Investment And Real Estate Development	13.30	-1.9%	2.3%	0.47
Medinet Nasr Housing	150.94	4.6%	6.0%	14.03	Misr Fertilizers Production Company	94.12	-1.7%	-1.9%	10.22
Egyptian Kuwaiti Holding-EGP	12.40	2.4%	3.3%	48.61	Credit Agricole Egypt	14.18	-1.6%	3.2%	12.48
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£)
Telecom Egypt	25.30	25.30	0.0%	24.76	Commercial International Bank	8.71	8.71	0.0%	4.01
T M G Holding	10.19	10.19	0.0%	10.13	Egyptian Kuwaiti Holding-	12.40	12.40	0.0%	48.61
Sidi Kerir Petrochemicals	13.61	13.61	0.0%	13.56	Ezz Steel	5.44	5.44	0.0%	171.91
Palm Hills Development Co.	2.23	2.23	0.0%	187.62	Housing & Development Bank	2.20	2.20	0.0%	16.65
Medinet Nasr Housing	150.94	150.94	0.0%	14.03	Juhayna Food Industries	3.61	3.61	0.0%	113.72

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HDFC Life Insurance Company Ltd	596.20	4.5%	5.3%	5989.076	Hindalco Industries	478.75	-1.7%	1.1%	2854.91
SBI Life Insurance	1267.55	2.2%	2.9%	2354.50	Jsw Steel	767.50	-1.0%	-0.1%	1260.00
Axis Bank	962.40	2.2%	3.1%	6630.62	Britannia Inds.	4250.00	-1.0%	-1.3%	2106.64
Titan Company	2618.80	2.1%	0.8%	2207.85	Mahindra & Mahindra	1251.00	-0.9%	0.1%	1893.06
Tata Consultancy Svs.	3312.00	1.6%	1.7%	4109.45	Reliance Industries	2555.80	-0.8%	0.3%	9043.19
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	962.40	965.60	-0.3%	6630.62	Wipro	397.20	372.40	6.7%	1184.32
State Bank Of India	612.95	629.55	-2.6%	4181.24	Tata Motors	393.90	366.20	7.6%	3727.22
Indusind Bank	1240.60	1275.80	-2.8%	2720.55	Tech Mahindra	1024.50	943.70	8.6%	1466.13
Jsw Steel	767.50	790.00	-2.8%	1260.00	Infosys	1521.00	1355.00	12.3%	6948.26
Bharti Airtel	817.00	860.55	-5.1%	1398.35	Kotak Mahindra Bank	1835.85	1631.00	12.6%	3043.36

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.62	3.8%	3.8%	0.35	WPP Scangroup	2.87	-4.7%	-4.7%	0.05
Kenya Reinsurance Corporation Ltd	1.87	2.2%	2.2%	0.02	Centum Investment Co.	8.20	-1.9%	-1.9%	0.09
Standard Chartered Bank Kenya Ltd	145.00	1.6%	1.6%	3.39	The Cooperative Bank of Kenya Ltd	12.10	-1.6%	-1.6%	1.81
NCBA Group	39.95	1.5%	1.5%	1.10	Nation Media Group	15.80	-0.9%	-0.9%	0.21
East African Breweries Limited	170.00	1.5%	1.5%	1.24	Absa Bank Kenya	12.20	-0.8%	-0.8%	1.64
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	39.95	39.95	0.0%	1.10	WPP Scangroup	2.87	2.80	2.5%	0.05
Standard Chartered Bank Kenya Ltd	145.00	148.75	-2.5%	3.39	Kengen Limited	3.22	3.10	3.9%	0.21
East African Breweries Limited	170.00	174.75	-2.7%	1.24	Safaricom	24.05	23.00	4.6%	13.85
Stanbic Holdings	102.00	108.00	-5.6%	0.04	Nairobi Securities Exchange	6.80	6.48	4.9%	0.24
Absa Bank Kenya	12.20	12.95	-5.8%	1.64	Nation Media Group	15.80	15.00	5.3%	0.21

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Wafrah for Industry and Development Co.	29.95	7.9%	17.0%	86.04	SEDCO Capital REIT Fund	10.04	-1.4%	-2.7%	2.26
Qassim Cement Co.	69.20	6.1%	13.3%	9.16	Bupa Arabia for Coop Insurance Co.	143.20	-1.2%	-0.4%	6.16
Filing and Packing Materials Manufacturing Co.	38.20	5.8%	9.6%	20.23	Arabia Insurance Cooperative Co.	10.00	-1.2%	0.0%	6.71
Saudi Advanced Industries Co.	29.95	5.1%	11.8%	44.95	Almarai Co.	52.70	-1.1%	-1.5%	8.35
Yanbu Cement Co.	39.00	4.6%	9.2%	7.03	Savola Group	27.90	-1.1%	1.6%	5.17
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.	141.80	141.80	0.0%	2.77	Al Alamiya for Coop Insurance Co.	11.70	11.70	0.0%	1.25
Nahdi Medical Co.	169.40	169.40	0.0%	20.39	Al Kathiri Holding Co.	37.80	37.80	0.0%	4.34
Elm Co.	333.00	333.00	0.0%	27.79	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Saudi Tadawul Group Holding Co.	185.00	185.00	0.0%	47.27	Amana Cooperative Insurance Co.	9.30	9.30	0.0%	5.42
ACWA POWER Co.	158.80	158.80	0.0%	20.31	Arabia Insurance Cooperative Co.	10.00	10.00	0.0%	6.71

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	299000.00	5.9%	5.9%	166264.93	Exxaro Resources Ltd	21229.00	-2.3%	-2.3%	7410.41
Prosus NV	123797.00	5.1%	5.1%	90961.08	Glencore	11320.00	-0.7%	-0.7%	26262.40
Gold Fields Ltd	18501.00	5.0%	5.0%	23311.26	Investec Ltd	10708.00	-0.4%	-0.4%	7121.25
AngloGold Ashanti Ltd	34546.00	4.9%	4.9%	28600.98	Northam Platinum Ltd	18718.00	-0.02%	0.0%	60646.32
Sibanye Stillwater Ltd	4686.00	4.8%	4.8%	20149.80					
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	10800.00	10800.00	0.0%	9088.20	Clicks Group Ltd	27413.00	26993.00	1.6%	12577.08
Investec Ltd	10708.00	10750.00	-0.4%	7121.25	SPAR Group Ltd	11577.00	11350.00	2.0%	11692.77
Glencore	11320.00	12259.00	-7.7%	26262.40	Aspen Pharmicare Holdings Ltd	13670.00	12889.00	6.1%	9274.41
The Bidvest Group Ltd	21622.00	23636.00	-8.5%	7407.70	Mr Price Group Ltd	16432.00	15422.00	6.5%	13155.79
British American Tobacco	68000.00	74444.00	-8.7%	50306.40	Vodacom Group Ltd	12447.00	11562.00	7.7%	11036.75

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	14550.00	7.0%	7.0%	212.945,54					
Hoa Phat Group JSC	19250.00	6.9%	6.9%	531.633,91					
Vincom Retail	28100.00	6.8%	6.8%	108.450,70					
Saigon Securities Inc	18900.00	6.8%	6.8%	336.288,02					
Bank for Inv. and Devp	41200.00	6.7%	6.7%	69.973,91					
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	78500.00	87004.15	-9.8%	116.080,73	Vietnam Rubber Group	14600.00	14600.00	0.0%	31.155,02
Vietcombank	82600.00	96000.00	-14.0%	88.383,50	Mobile World Inv. Corp	43950.00	43950.00	0.0%	87.019,31
Saigon Beer Alcohol Beverage Corp.	169000.00	197900.00	-14.6%	20.719,01	No Va Land Invest	14650.00	14650.00	0.0%	175.012,49
Bank for Inv. and Devp	41200.00	49950.00	-17.5%	69.973,91	Phat Dat Real Estate Development Corp	14550.00	14550.00	0.0%	212.945,54
FPT Corp	80000.00	97944.43	-18.3%	121.138,81	BaoViet Holdings	47700.00	46600.00	2.4%	12.771,64

*No losers on 3/1

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