

# Daily Market Report

05 January 2023

## JSE

JSE All-Share Index was up by 0.18% and closed at 74,567.61 points on Wednesday, as the Industrial and Financial sectors recorded gains.

## BRVM

BRVM Composite Index declined by 0.64% and closed at 202.69 points on Wednesday, with NEI-CEDA Côte d'Ivoire and BICI Côte d'Ivoire being the top losers.

## NSE

NGX All-Share Index was up by 0.12% to close at 51,657.56 points on Wednesday, as the Banking, Consumer Goods and Oil & Gas sectors recorded gains.

## EGX

EGX 30 Index surged by 3.25% and closed at 15,557.46 points on Wednesday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

## ESG

Casablanca ESG 10 Index dropped by 1.53% to close at 792.41 points on Wednesday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	0.18%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.64%
<b>NGX</b> Nigerian Stock Exchange	▲	0.12%
<b>EGX</b> Egyptian Stock Exchange	▲	3.25%
<b>ESG</b> Casablanca Stock Exchange	▼	1.53%

## African Markets

**Nigeria:** NGX 30 Index was up by 0.14% to close at 1,856.76 points on Wednesday. Nigerian Breweries and FCMB were the top gainers.

**Egypt:** EGX 30 Index surged by 3.25% and closed at 15,557.46 points on Wednesday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index increased by 0.62% and closed at 1,685.71 points on Wednesday. WPP Scangroup and Centum Investment Company were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.25% and closed at 68,530.44 points on Wednesday, as the Industrial and Financial sectors recorded gains.

## Nigeria Key Indicators

	Current
Inflation	21.47%
Exchange Rate	₦ 450.03
<b>INTERBANK RATES</b>	
OPR	9.50 ↔
Overnight	9.83 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index inched down by 0.08% to close at 10,279.29 points on Wednesday, as losses in the Telecommunications, Utilities and Financials sectors pushed shares lower. MSCI UAE decreased by 0.36% to close at 414.93 points.

**Vietnam:** VN-30 Index increased by 0.28% to close at 1,050.15 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.42% to close at 643.25 points.

**Saudi Arabia:** Tadawul All Share Index dropped by 1.21% to close at 10,531.90 points on Wednesday, as losses in the Diversified Financials, Capital Goods, and Consumer Durables & Apparel sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.26% to close at 1,465.70 points.

**India:** Nifty 50 Index declined by 1.04% to close at 18,042.95 points on Wednesday, as losses in the Bank, IT, and Financial Services sectors pushed shares lower. MSCI India declined by 1.06% to close at 2,059.43 points.

## News

### Nigeria:

Buhari Signs N21.83trn 2023 Budget, Defers Finance Bill  
Nigeria's debt to hit N77tn, loan servicing gulps N5.2tn  
FG releases N13.89bn to 2022 Contributory Pension retirees

### Kenya:

Foreign investors pull out Sh24 billion from NSE in 2022  
Kenya's public debt growth pace slowest in four years  
Kenya Airways shares trade freeze extended for a year

### Abu Dhabi:

Dubai unveils \$8.7tn plan to double its economy by 2033  
UAE's non-oil private sector growth further eases in December: S&P Global  
Atlantic Council Global Energy Forum in Abu Dhabi to set global energy agenda

### Saudi Arabia:

OPEC oil output rises despite production target cuts  
Saudi Aramco awards contract to develop \$690m seawater desalination plant  
SAMA launches Open Banking Lab to facilitate financial innovation

### Egypt:

Egypt's PMI for non-oil business improves slightly in December  
Egypt's foreign exchange reserves rise to \$34 billion  
Egypt's NBE, Banque Misr issue new 25% yield certificates, highest ever on record

### South Africa:

Naspers and Prosus have now banked R120bn from Tencent equity sale  
SA household finances are strained; vehicle loans show early signs of stress  
Pharma industry disappointed at 3.28% price increase for medications

### India:

Govt approves Rs 19,744 cr National Green Hydrogen Mission  
HDFC Bank posts 19.5% loan growth in Q3  
Services sector activity at 6-mth high in Dec

### Vietnam:

Seafood exports reach record 11 bn USD in 2022, challenges ahead  
Vietnam earns over 400 mln USD from tourism during New Year holiday  
Hanoi eyes 950 firms in support industries this year

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,279.29	-0.1%	0.7%	0.7%	0.7%	AED/USD	3.67	0.0%	0.0%
Egypt	15,557.46	3.2%	6.6%	6.6%	6.6%	EGP/USD	26.45	6.8%	7.1%
India	18,042.95	-1.0%	-0.3%	-0.3%	-0.3%	INR/USD	82.67	-0.1%	-0.1%
Kenya	1,685.71	0.6%	0.6%	0.6%	0.6%	KES/USD	123.55	0.0%	0.0%
Nigeria	1,856.76	0.1%	0.8%	0.8%	0.8%	NGN/USD	449.01	0.1%	0.2%
Saudi Arabia	10,531.90	-1.2%	0.5%	0.5%	0.5%	SAR/USD	3.76	0.0%	0.1%
South Africa	68,530.44	0.2%	2.4%	2.4%	2.4%	ZAR/USD	16.89	-0.8%	-0.8%
Vietnam	1,050.15	0.3%	4.5%	4.5%	4.5%	VND/USD	23,525.00	0.0%	-0.5%

## MSCI Emerging Markets

MSCI Frontier	480.42	0.3%	1.7%	1.7%	1.7%	Brent Crude (\$)	77.84	-5.2%	-9.4%
MSCI Frontier 100	1,113.10	0.3%	2.1%	2.1%	2.1%	Gold (\$)	1,859.00	0.7%	1.8%
MSCI Emerging	974.22	1.2%	1.9%	1.9%	1.9%	Copper (\$)	8,252.00	-0.8%	-1.4%
MSCI World (USD)	2,624.35	0.9%	0.8%	0.8%	0.8%	Coffee (\$)	157.78	0.3%	1.0%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	45.10	10.0%	10.0%	66.43	UBA	8.00	-3.6%	5.3%	99.41
FCMB	3.86	10.0%	0.3%	4.49	BUA Cement	96.00	-1.8%	-1.8%	9851.33
Fidelity	4.79	9.9%	10.1%	27.95	FBNH	11.05	-1.8%	1.4%	13.69
Flour Mills	30.00	5.6%	5.6%	8.63	Dangote Sugar	16.00	-0.3%	-0.3%	19.33
Axamansard	2.10	5.0%	5.0%	1.99					
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%	0.62	Unilever	11.60	10.50	10.5%	2.61
Total	193.00	193.00	0.0%	14.97	Cap	17.80	15.25	16.7%	1.01
Seplat Petroleum	1100.00	1100.00	0.0%	5.67	Nascon	11.10	9.00	23.3%	8.79
P Z Cussons	12.10	12.10	0.0%	6.67	Sterling	1.43	1.13	26.5%	7.87
Presco	137.50	137.50	0.0%	3.00	Guaranty	23.50	18.00	30.6%	284.43

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Hotels Co.	4.72	14.8%	23.2%	3.84	National Corp for Tourism & Hotels	2.87	-5.0%	-4.3%	0.45
Sharjah Cement and Industrial Development Co.	0.68	10.2%	10.2%	0.02	Abu Dhabi National Takaful Co.	5.80	-4.9%	-9.9%	0.00
Gulf Cement Co.	0.52	6.6%	-0.4%	0.04	Response Plus Holding	5.79	-2.7%	-6.5%	8.27
PALMS SPORTS	9.78	4.0%	-0.2%	5.97	Invictus Investment Company	3.85	-1.3%	0.8%	10.36
ESHRAQ INVESTMENTS	0.51	3.5%	4.3%	24.18	Arkan Building Materials Company	1.66	-1.2%	4.4%	4.01
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£)
Alexandria Containers and goods	22.56	10.4%	21.3%	22.90	Ibnsina Pharma	9.09	-3.3%	-7.2%	7.45
Abou Kir Fertilizers	45.05	9.6%	16.1%	115.89	Housing & Development Bank	2.14	-2.7%	-0.9%	22.04
Sidi Kerir Petrochemicals	14.70	8.0%	12.0%	12.75	Juhayna Food Industries	3.57	-1.1%	9.8%	121.53
Egyptian Financial Group	35.00	6.8%	11.0%	139.03	Qatar National Bank Alahly	18.32	-0.6%	5.3%	2.43
Alexandria Mineral Oils Co.	6.91	5.2%	9.3%	71.09					
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	25.62	25.62	0.0%	24.11	Commercial International Bank	8.75	8.75	0.0%	31.57
T M G Holding	10.45	10.45	0.0%	9.54	Egyptian Kuwaiti Holding	13.00	13.00	0.0%	142.53
Sidi Kerir Petrochemicals	14.70	14.70	0.0%	12.75	Ezz Steel	5.47	5.47	0.0%	186.47
Palm Hills Development Co.	2.24	2.24	0.0%	162.21	Housing & Development Bank	2.14	2.14	0.0%	22.04
Medinet Nasr Housing	155.69	155.69	0.0%	32.61	Juhayna Food Industries	3.57	3.57	0.0%	121.53

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	3430.00	1.1%	0.5%	1253.644	Jsw Steel	735.95	-4.2%	-4.2%	2099.89
Maruti Suzuki India	8419.00	0.4%	0.3%	4772.68	Hindalco Industries	460.45	-4.1%	-2.7%	4604.63
HDFC Life Insurance Company Ltd	597.90	0.4%	5.6%	4653.99	Coal India	216.90	-3.2%	-3.6%	2084.96
Eicher Motors	3216.00	0.1%	-0.4%	1198.08	Tata Steel	115.45	-2.5%	2.5%	6484.77
Dr Reddys Lab	4241.45	0.1%	0.1%	707.22	ONGC	146.40	-2.1%	-0.2%	1981.52
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	958.60	970.00	-1.2%	8724.56	Tata Motors	385.75	366.20	5.3%	6243.52
State Bank Of India	605.60	629.55	-3.8%	4260.91	Divi's Laboratories Ltd	3430.00	3195.15	7.4%	1253.64
Indusind Bank	1220.95	1275.80	-4.3%	9862.73	Tech Mahindra	1019.70	943.70	8.1%	1736.36
SBI Life Insurance	1260.65	1340.35	-5.9%	1363.02	Infosys	1494.95	1355.00	10.3%	10599.90
Icici Bank	897.65	958.20	-6.3%	11213.98	Kotak Mahindra Bank	1824.90	1631.00	11.9%	3042.12

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup	3.00	4.5%	-0.3%	0.04	NCBA Group	38.80	-2.9%	-1.4%	0.58
Centum Investment Company	8.46	3.2%	1.2%	0.05	Bamburi Cement Ltd	31.15	-1.0%	-1.1%	0.08
Kenya Power & Lighting Limited	1.67	3.1%	7.1%	0.82	Total Kenya Ltd	23.65	-0.8%	-0.8%	0.04
Standard Chartered Bank Kenya Ltd	149.25	2.9%	4.6%	3.49	Absa Bank Kenya	12.10	-0.8%	-1.6%	1.29
Diamond Trust Bank Limited	51.00	2.3%	2.0%	0.06	Safaricom	23.90	-0.6%	-1.0%	45.00
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)
Standard Chartered Bank Kenya Ltd	149.25	148.75	0.3%	3.49	Safaricom	23.90	23.00	3.9%	45.00
NCBA Group	38.80	39.95	-2.9%	0.58	Nairobi Securities Exchange	6.80	6.48	4.9%	0.09
East African Breweries Limited	169.00	174.75	-3.3%	31.30	Kengen Limited	3.26	3.10	5.2%	0.36
Stanbic Holdings	102.00	108.00	-5.6%	0.00	Nation Media Group	15.90	15.00	6.0%	0.10
Absa Bank Kenya	12.10	12.95	-6.6%	1.29	Bamburi Cement Ltd	31.15	29.10	7.0%	0.08

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Sagr Coop Insurance Co.	15.20	6.4%	8.3%	13.91	Arab National Bank	31.60	-4.8%	-1.4%	24.74
National Metal Manufacturing and Casting Co.	18.74	5.2%	10.8%	20.55	Al Yamamah Steel Industries Co.	22.84	-4.1%	2.0%	5.44
National Company for Learning and Education	71.40	2.6%	4.5%	5.88	Al Hassan Ghazi Ibrahim Shaker Co.	19.30	-4.1%	0.9%	9.75
Qassim Cement Co.	70.90	2.5%	16.0%	13.05	Bawan Co.	30.35	-4.0%	3.4%	15.94
Alinma Tokio Marine Co.	12.80	2.4%	6.7%	8.99	Saudi Industrial Export Co.	32.10	-3.9%	3.5%	24.47
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.	140.20	140.20	0.0%	6.11	Al Alamiya for Coop Insurance Co.	11.76	11.76	0.0%	1.83
Nahdi Medical Co.	168.00	168.00	0.0%	20.37	Al Kathiri Holding Co.	37.80	37.80	0.0%	4.46
Elm Co.	329.00	329.00	0.0%	24.74	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Saudi Tadawul Group Holding Co.	180.20	180.20	0.0%	110.06	Amana Coop Insurance Co.	9.37	9.37	0.0%	12.95
ACWA POWER Co.	158.60	158.60	0.0%	57.57	Anaam International Holding Group	21.18	21.18	0.0%	20.88

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
SPAR Group Ltd	12200.00	5.9%	7.5%	33428.00	Glencore	10483.00	-7.4%	-8.1%	76421.07
Prosus NV	128700.00	4.0%	9.3%	153153.00	Exxaro Resources Ltd	19877.00	-6.4%	-8.5%	17620.76
Gold Fields Ltd	19066.00	3.1%	8.2%	38322.66	Sasol Ltd	25861.00	-4.2%	-4.0%	55601.15
AngloGold Ashanti Ltd	35417.00	2.5%	7.6%	39312.87	Anglo American	64637.00	-2.9%	-2.6%	73686.18
Naspers Ltd	305994.00	2.3%	8.3%	227641.18	Anglo American Platinum Ltd	145500.00	-0.9%	2.1%	26261.30
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	10822.00	10822.00	0.0%	9054.88	Clicks Group Ltd	27444.00	26993.00	1.7%	12701.36
Investec	10942.00	10942.00	0.0%	10394.90	Aspen Pharmcare Holdings Ltd	13726.00	12889.00	6.5%	9529.14
British American Tobacco	68050.00	74444.00	-8.6%	36947.75	Mr Price Group Ltd	16450.00	15422.00	6.7%	12068.38
The Bidvest Group Ltd	21523.00	23636.00	-8.9%	10356.87	Vodacom Group Ltd	12396.00	11562.00	7.2%	10298.84
Glencore	10483.00	12259.00	-14.5%	76421.07	SPAR Group Ltd	12200.00	11350.00	7.5%	33428.00

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam National Petroleum Group	35250.00	7.0%	11.2%	52.567,26	No Va Land Invest	14000.00	-4.4%	0.0%	221.499,85
Masan Group Corp	99300.00	3.4%	6.8%	53.588,25	Vingroup	56000.00	-1.4%	4.1%	108.734,73
Phat Dat Real Estate Development Corp	15000.00	3.1%	10.3%	194.862,03	Vietjet Aviation	110400.00	-1.2%	0.8%	21.465,76
Vietnam Prosperity	18900.00	2.2%	5.6%	808.332,38	Mobile World Inv. Corp	43500.00	-1.0%	1.4%	82.270,54
Vietnam JSC Bank	28500.00	1.8%	4.6%	164.158,28	Bank for Inv. and Devp	40800.00	-1.0%	5.7%	85.321,78
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	79300.00	87004.15	-8.9%	86.031,09	Vietnam Rubber Group	14850.00	14850.00	0.0%	28.633,96
Saigon Beer Alcohol Beverage Corp.	171500.00	197900.00	-13.3%	20.010,03	Mobile World Inv. Corp	43500.00	43500.00	0.0%	82.270,54
Vietcombank	82800.00	96000.00	-13.8%	69.171,69	No Va Land Invest	14000.00	14000.00	0.0%	221.499,85
Bank for Inv. and Devp	40800.00	49950.00	-18.3%	85.321,78	Phat Dat Real Estate Development Corp	15000.00	15000.00	0.0%	194.862,03
FPT Corp	80000.00	97944.43	-18.3%	63.713,52	BaoViet Holdings	47700.00	46600.00	2.4%	24.226,68

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