

Daily Market Report

09 January 2023

JSE

JSE All-Share Index climbed by 1.88% and closed at 76,858.94 points on Friday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index dropped by 1.24% and closed at 199.94 points on Friday, with Nestle Côte d'Ivoire and Saph Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.70% to close at 51,222.34 points on Friday, as the Banking, Industrial, and Insurance sectors recorded gains.

EGX

EGX 30 Index was closed on Sunday on account of Christmas Day (Eastern).

ESG

Casablanca ESG 10 Index fell by 3.64% to close at 731.59 points on Friday.

Capital Markets

| | | |
|--|---|-------|
| JSE Johannesburg Stock Exchange | ▲ | 1.88% |
| BRVM Bourse Régionale des Valeurs Mobilières | ▼ | 1.24% |
| NGX Nigerian Stock Exchange | ▲ | 0.70% |
| EGX Egyptian Stock Exchange | ↔ | 0.00% |
| ESG Casablanca Stock Exchange | ▼ | 3.64% |

African Markets

Nigeria: NGX 30 Index increased by 0.66% to close at 1,844.44 points on Friday. Access and FBNH were the top gainers.

Egypt: EGX 30 Index was closed on Sunday on account of Christmas Day (Eastern).

Kenya: NSE 20 Index increased by 0.34% and closed at 1,705.33 points on Friday. Total Kenya Ltd and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index surged by 2.04% and closed at 70,810.32 points on Friday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

| | Current |
|------------------------|----------|
| Inflation | 21.47% |
| Exchange Rate | ₦ 450.55 |
| INTERBANK RATES | |
| OPR | 13.00 ▲ |
| Overnight | 14.50 ▲ |

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.54% to close at 10,197.78 points on Friday, as losses in the Health Care, Real Estate, and Financials sectors pushed shares lower. MSCI UAE declined by 0.80% to close at 409.13 points.

Vietnam: VN-30 Index decreased by 0.42% to close at 1,057.40 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.96% to close at 645.21 points.

Saudi Arabia: Tadawul All Share Index inched up by 0.05% to close at 10,536.91 points on Sunday, as gains in the Capital Goods, Utilities, and Software & Services sectors led shares higher. MSCI Saudi Arabia inched down by 0.02% to close at 1,465.37 points.

India: Nifty 50 Index declined by 0.74% to close at 17,859.45 points on Friday, as losses in the Bank, IT, and Financial Services sectors pushed shares lower. MSCI India declined by 0.79% to close at 2,041.51 points.

News

Nigeria:

Oil production hits nine-month high
FG pays N4.12tn interest on CBN loan
Premium Pension assets under management hits N1tn

Kenya:

Oil marketers paid Sh87.8bn subsidy in nine months
Bondholders take up Sh39 billion in switch auction
Free mobile transfers push transactions above half of GDP

Abu Dhabi:

Abu Dhabi eyed Standard Chartered takeover to form giant \$1.1 trn bank
Abu Dhabi Islamic Bank raises stake in ADIB Egypt
Dubai's \$177bn investment chase to lean on US and UK for cash

Saudi Arabia:

Real estate activity in Saudi Arabia drops 53.7% during the first week of 2023
Capital market institutions report 77% Saudization in Q3 2022
Saudi ports record 13% rise in volume of cargo in 2022

Egypt:

Microfinance increases to EGP 64.6bn in June 2022: CBE
Egypt allocated LE 4.4 bln investments for Red Sea governorate
Egypt's agricultural exports hit 6.5 million tons for 1st time ever

South Africa:

Factory production improves for third month running
SA bonds ready for resurrection after a year of horror
ANC signals caution on green energy transition

India:

RBI to issue green bonds in two tranches of Rs 8,000 cr each
NBFCs eye funds from bond markets as bank loan rates rise
Merc sales up 41% at 16k in 2022, highest ever in India

Vietnam:

Nearly 900 million USD in FDI registered in Bac Giang
Hong Kong firms seek more cooperation opportunities in Vietnam
Vietnam boosts logistics industry's competitiveness

Indices and FX Data

| Indices | Last Trade | 1d% | WTD% | MTD% | YTD% | Currency/Commodity | Last Trade | 1d% | YTD% |
|--------------|------------|-------|-------|-------|-------|--------------------|------------|-------|-------|
| Abu Dhabi | 10,197.78 | -0.5% | 0.0% | -0.1% | -0.1% | AED/USD | 3.67 | 0.0% | 0.0% |
| Egypt | 16,002.18 | 0.0% | 0.0% | 9.6% | 9.6% | EGP/USD | 27.15 | -0.2% | 9.9% |
| India | 17,859.45 | -0.7% | 0.0% | -1.4% | -1.4% | INR/USD | 82.27 | -0.4% | -0.6% |
| Kenya | 1,705.33 | 0.3% | 0.0% | 1.7% | 1.7% | KES/USD | 123.65 | 0.0% | 0.1% |
| Nigeria | 1,844.44 | 0.7% | 0.0% | 0.1% | 0.1% | NGN/USD | 450.05 | 0.1% | 0.4% |
| Saudi Arabia | 10,536.91 | 0.05% | 0.05% | 0.6% | 0.6% | SAR/USD | 3.76 | 0.0% | 0.0% |
| South Africa | 70,810.32 | 2.0% | 0.0% | 5.8% | 5.8% | ZAR/USD | 17.11 | -0.3% | 0.5% |
| Vietnam | 1,057.40 | -0.4% | 0.0% | 5.2% | 5.2% | VND/USD | 23,470.00 | -0.1% | -0.7% |

MSCI Emerging Markets

| | | | | | | | | | |
|-------------------|----------|-------|------|------|------|------------------|----------|-------|-------|
| MSCI Frontier | 478.44 | -0.4% | 0.0% | 1.3% | 1.3% | Brent Crude (\$) | 78.57 | -0.2% | -8.5% |
| MSCI Frontier 100 | 1,109.65 | -0.4% | 0.0% | 1.7% | 1.7% | Gold (\$) | 1,869.70 | 1.6% | 2.4% |
| MSCI Emerging | 988.68 | 0.5% | 0.0% | 3.4% | 3.4% | Copper (\$) | 8,589.50 | 2.6% | 2.6% |
| MSCI World (USD) | 2,649.76 | 2.1% | 0.0% | 1.8% | 1.8% | Coffee (\$) | 153.85 | -0.5% | -1.5% |

STOCKS

Nigeria

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₦) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₦) |
|---------------------------|------------|---------|----------|--------------|----------------------|------------|-------|----------|------------|
| Airtel Africa | 1550.00 | 3.3% | -5.2% | 1700.76 | P Z Cussons | 11.00 | -9.1% | -3.1% | 30.66 |
| Access | 9.00 | 2.3% | 5.9% | 123.05 | Nascon | 10.55 | -5.0% | -5.0% | 4.14 |
| Axamansard | 2.13 | 1.4% | 6.5% | 0.69 | FCMB | 3.70 | -4.1% | -3.9% | 11.01 |
| FBNH | 11.15 | 1.4% | 2.3% | 466.50 | Nestle | 1080.00 | -1.8% | -1.8% | 255.38 |
| Transnational Corporation | 1.17 | 0.9% | 3.5% | 9.16 | Fidelity | 4.75 | -0.6% | 9.2% | 40.31 |
| Stocks near 52 w high | Last Price | 52w H | % Change | Value (mn ₦) | Stocks near 52 w Low | Last Price | 52w L | % Change | Val (mn ₦) |
| Wema | 3.90 | 3.90 | 0.0% | 0.10 | Unilever | 11.60 | 10.50 | 10.5% | 2.63 |
| UACN | 10.50 | 10.50 | 0.0% | 6.03 | Cap | 17.80 | 15.25 | 16.7% | 0.36 |
| Total | 193.00 | 193.00 | 0.0% | 28.12 | Nascon | 10.55 | 9.00 | 17.2% | 4.14 |
| Seplat Petroleum | 1100.00 | 1100.00 | 0.0% | 211.48 | Sterling | 1.40 | 1.13 | 23.9% | 8.10 |
| P Z Cussons | 11.00 | 11.00 | 0.0% | 30.66 | Custodian | 6.00 | 4.55 | 31.9% | 5.26 |

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. | 5.85 | 14.9% | 52.7% | 5.02 | Fujairah Cement Industries | 0.44 | -9.9% | -9.9% | 0.00 |
| FOODCO NATIONAL FOODSTUFF | 2.89 | 14.7% | 14.7% | 0.00 | Sharjah Cement and Industrial Devp Co. | 0.61 | -9.6% | -0.3% | 0.16 |
| Aram Group | 2.24 | 12.0% | 0.4% | 0.00 | Ras Al Khaimah Poultry & Feeding Co. | 1.65 | -2.9% | 2.5% | 0.05 |
| Abu Dhabi National Co. for Building Materials | 0.20 | 9.3% | 9.3% | 0.02 | First Abu Dhabi Bank | 16.70 | -2.3% | -2.3% | 26.87 |
| National Corp for Tourism & Hotels | 2.99 | 4.9% | -0.3% | 0.03 | Hayah Insurance Co. | 0.99 | -2.0% | 2.1% | 0.02 |
| 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% | 2.02 | 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£) |
|-------------------------------|------------|--------|----------|---------------|-------------------------------------|------------|-------|----------|-------------|
| Credit Agricole Egypt | 16.24 | 14.3% | 13.5% | 23.30 | ELSWEDY ELECTRIC | 25.57 | -3.5% | 10.0% | 80.14 |
| Ezz Steel | 5.91 | 8.0% | 12.8% | 380.62 | Citadel Capital | 5.12 | -3.4% | -3.8% | 3.52 |
| Commercial International Bank | 9.45 | 8.0% | 11.7% | 23.78 | GB AUTO | 8.93 | -2.8% | 12.2% | 81.09 |
| Sidi Kerir Petrochemicals | 15.43 | 5.0% | 17.6% | 15.03 | Ibnsina Pharma | 8.87 | -2.4% | -9.4% | 17.08 |
| Egyptian Kuwaiti Holding | 13.62 | 4.8% | 13.5% | 146.92 | Misr Fertilizers Production Company | 96.40 | -1.6% | 3.7% | 18.47 |
| 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 | 25.97 | 25.97 | 0.0% | 25.60 | Commercial International Bank | 9.45 | 9.45 | 0.0% | 23.78 |
| T M G Holding | 10.45 | 10.45 | 0.0% | 10.30 | Egyptian Kuwaiti Holding | 13.62 | 13.62 | 0.0% | 146.92 |
| Sidi Kerir Petrochemicals | 15.43 | 15.43 | 0.0% | 15.03 | Ezz Steel | 5.91 | 5.91 | 0.0% | 380.62 |
| Palm Hills Development Co. | 2.21 | 2.21 | 0.0% | 99.91 | Housing & Development Bank | 2.12 | 2.12 | 0.0% | 25.42 |
| Medinet Nasr Housing | 158.55 | 158.55 | 0.0% | 28.28 | Juhayna Food Industries | 3.62 | 3.62 | 0.0% | 123.69 |

*Market closed on 8/1

India

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₹) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₹) |
|-----------------------|------------|---------|----------|--------------|-------------------------|------------|---------|----------|------------|
| Britannia Inds. | 4365.00 | 1.2% | 1.3% | 1294.123 | Jsw Steel | 728.00 | -3.0% | -5.2% | 2605.57 |
| Reliance Industries | 2537.00 | 0.9% | -0.4% | 7428.11 | Tata Consultancy Svcs. | 3213.90 | -2.9% | -1.3% | 8061.29 |
| Mahindra & Mahindra | 1263.40 | 0.9% | 1.1% | 2798.09 | Indusind Bank | 1182.00 | -2.8% | -3.1% | 3614.21 |
| Bharat Petroleum | 345.00 | 0.8% | 4.4% | 1267.53 | Bajaj Finserv | 1430.00 | -2.6% | -7.6% | 7492.25 |
| ONGC | 147.50 | 0.7% | 0.5% | 2473.57 | Tech Mahindra | 986.00 | -2.5% | -3.0% | 2333.55 |
| 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 | 941.00 | 970.00 | -3.0% | 5443.29 | Tata Motors | 382.05 | 366.20 | 4.3% | 3347.09 |
| Britannia Inds. | 4365.00 | 4537.00 | -3.8% | 1294.12 | Tech Mahindra | 986.00 | 943.70 | 4.5% | 2333.55 |
| State Bank Of India | 601.00 | 629.55 | -4.5% | 4795.74 | Infosys | 1449.80 | 1355.00 | 7.0% | 9391.07 |
| SBI Life Insurance | 1270.00 | 1340.35 | -5.2% | 2141.11 | Divi's Laboratories Ltd | 3430.00 | 3195.15 | 7.4% | 1220.84 |
| Larsen & Toubro | 2088.00 | 2211.60 | -5.6% | 3931.68 | Kotak Mahindra Bank | 1788.90 | 1631.00 | 9.7% | 6799.82 |

Kenya

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn KSh) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn KSh) |
|-----------------------------------|------------|--------|----------|----------------|-----------------------------------|------------|-------|----------|--------------|
| Total Kenya Ltd | 24.00 | 9.8% | 0.6% | 0.23 | Centum Investment Company Plc | 8.32 | -2.1% | -0.5% | 0.13 |
| NCBA Group | 39.65 | 2.7% | 0.8% | 17.53 | Safaricom | 23.50 | -1.7% | -2.7% | 47.57 |
| KCB Group | 39.20 | 2.2% | 2.9% | 1.12 | Kengen Limited | 3.24 | -0.6% | 0.6% | 0.44 |
| Diamond Trust Bank Limited | 52.00 | 1.5% | 4.0% | 0.37 | Nation Media Group | 16.25 | -0.6% | 1.9% | 0.10 |
| The Cooperative Bank of Kenya Ltd | 12.40 | 1.2% | 0.8% | 0.77 | Kenya Power & Lighting Limited | 1.68 | -0.6% | 7.7% | 2.29 |
| 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 | 39.65 | 39.95 | -0.8% | 17.53 | Kengen Limited | 3.24 | 3.27 | -0.9% | 0.44 |
| Standard Chartered Bank Kenya Ltd | 150.50 | 153.00 | -1.6% | 3.42 | Centum Investment Company | 8.32 | 8.00 | 4.0% | 0.13 |
| Stanbic Holdings | 102.25 | 106.00 | -3.5% | 0.00 | Kenya Reinsurance Corporation Ltd | 1.89 | 1.80 | 5.0% | 0.10 |
| Absa Bank Kenya | 12.05 | 12.95 | -6.9% | 79.67 | Nation Media Group | 16.25 | 15.40 | 5.5% | 0.10 |
| Total Kenya Ltd | 24.00 | 26.40 | -9.1% | 0.23 | Safaricom | 23.50 | 22.00 | 6.8% | 47.57 |

Saudi Arabia

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn SAR) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn SAR) |
|---|------------|--------|----------|----------------|--|------------|-------|----------|--------------|
| Ethiad Atheeb Telecommunication Co. | 64.20 | 9.9% | 36.7% | 120.54 | Alinma Tokio Marine Co. | 12.24 | -2.1% | 2.0% | 7.51 |
| Raydan Food Co. | 24.16 | 9.9% | 15.7% | 22.71 | Saudi British Bank | 38.60 | -1.7% | -0.9% | 25.65 |
| Al Kathiri Holding Co. | 41.00 | 8.3% | 15.3% | 11.72 | Saudia Dairy and Foodstuff Co. | 230.00 | -1.6% | 6.5% | 1.24 |
| Saudi Arabian Amiantit Co. | 37.00 | 7.9% | 13.8% | 28.07 | Ataa Educational Co. | 54.30 | -1.5% | -0.4% | 12.43 |
| Al Hammadi Company for Development and Investment | 45.00 | 7.1% | 12.2% | 15.66 | National Metal Manufacturing and Casting Co. | 18.44 | -1.4% | 9.0% | 5.65 |
| 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) |
| Nahdi Medical Co. | 169.80 | 169.80 | 0.0% | 7.02 | Al Alamiya for Coop Insurance Co. | 12.00 | 12.00 | 0.0% | 0.91 |
| Elm Co. | 332.00 | 332.00 | 0.0% | 10.07 | Al Kathiri Holding Co. | 41.00 | 41.00 | 0.0% | 11.72 |
| Saudi Tadawul Group Holding Co. | 180.00 | 180.00 | 0.0% | 18.93 | Alandalus Property Co. | 0.00 | 0.00 | 0.0% | 0.00 |
| ACWA POWER Co. | 159.00 | 159.00 | 0.0% | 17.82 | Amana Coop Insurance Co. | 9.21 | 9.21 | 0.0% | 3.53 |
| Arabian Internet and Communications Services Co. | 241.60 | 241.60 | 0.0% | 8.26 | Arabia Insurance Cooperative Co. | 10.06 | 10.06 | 0.0% | 9.67 |

South Africa

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn R) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn R) |
|--------------------------|------------|----------|----------|--------------|-------------------------------|------------|----------|----------|------------|
| Gold Fields Ltd | 20430.00 | 6.1% | 16.0% | 44537.40 | Nedbank Group Ltd | 20914.00 | -2.1% | -1.6% | 24260.24 |
| Anglo American | 71216.00 | 5.4% | 7.4% | 88307.84 | Investec Ltd | 10779.00 | -1.4% | 0.3% | 6350.66 |
| Sibanye Stillwater Ltd | 4975.00 | 4.6% | 11.2% | 31591.25 | Investec | 10856.00 | -1.3% | 0.8% | 26271.52 |
| Glencore | 10837.00 | 3.4% | -5.0% | 44431.70 | Standard Bank Group Ltd | 16676.00 | -1.2% | -0.6% | 45859.00 |
| Naspers Ltd | 313824.00 | 3.3% | 11.1% | 209709.75 | Mr Price Group Ltd | 16337.00 | -1.2% | 2.8% | 12646.14 |
| 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 | 10779.00 | 10935.00 | -1.4% | 6350.66 | Clicks Group Ltd | 27761.00 | 26993.00 | 2.8% | 19296.67 |
| Investec | 10856.00 | 11000.00 | -1.3% | 26271.52 | Mr Price Group Ltd | 16337.00 | 15422.00 | 5.9% | 12646.14 |
| British American Tobacco | 69292.00 | 74444.00 | -6.9% | 35853.07 | Vodacom Group Ltd | 12300.00 | 11562.00 | 6.4% | 13038.00 |
| The Bidvest Group Ltd | 21623.00 | 23636.00 | -8.5% | 6258.56 | Aspen Pharmacare Holdings Ltd | 13990.00 | 12889.00 | 8.5% | 9538.24 |
| Glencore | 10837.00 | 12259.00 | -11.6% | 44431.70 | SPAR Group Ltd | 12337.00 | 11350.00 | 8.7% | 18752.24 |

Vietnam

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn đ) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn đ) |
|--|------------|-----------|----------|--------------|---------------------------------------|------------|-----------|----------|--------------|
| Saigon Beer Alcohol Beverage Corp. | 180700.00 | 3.7% | 8.3% | 23.342,03 | Masan Group Corp | 95800.00 | -3.7% | 3.0% | 52.248,69 |
| Viet Nam International Commercial Joint Stock Bank | 20600.00 | 2.5% | 8.4% | 105.114,44 | Vietnam Rubber Group | 14400.00 | -3.4% | 4.3% | 38.264,58 |
| Bank for Inv. and Devp | 41650.00 | 2.2% | 7.9% | 142.785,88 | Phat Dat Real Estate Development Corp | 14750.00 | -2.6% | 8.5% | 178.732,31 |
| Asia Commercial JS Bank | 23150.00 | 1.3% | 5.7% | 78.673,12 | Saigon Securities Inc | 18900.00 | -2.1% | 6.8% | 253.812,32 |
| Sai Gon Thuong Tin Commercial | 24300.00 | 0.4% | 8.0% | 633.094,87 | Hoa Phat Group | 19400.00 | -2.0% | 7.8% | 386.878,65 |
| 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 | 79800.00 | 87004.15 | -8.3% | 102.222,21 | Vietnam Rubber Group | 14400.00 | 14400.00 | 0.0% | 38.264,58 |
| Saigon Beer Alcohol Beverage Corp. | 180700.00 | 197900.00 | -8.7% | 23.342,03 | Mobile World Inv. Corp | 43150.00 | 43150.00 | 0.0% | 65.542,31 |
| Vietcombank | 84000.00 | 96000.00 | -12.5% | 94.852,09 | No Va Land Invest | 13600.00 | 13600.00 | 0.0% | 224.363,02 |
| Bank for Inv. and Devp | 41650.00 | 49950.00 | -16.6% | 142.785,88 | Phat Dat Real Estate Development Corp | 14750.00 | 14750.00 | 0.0% | 178.732,31 |
| FPT Corp | 80300.00 | 97944.43 | -18.0% | 57.972,62 | Vietjet Aviation | 107800.00 | 105100.00 | 2.6% | 40.027,57 |

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