

Daily Market Report

10 January 2023

JSE

JSE All-Share Index jumped by 1.93% and closed at 78,342.70 points on Monday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index declined by 0.52% and closed at 198.91 points on Monday, with Oragroup Togo and Total Senegal being the top losers.

NSE

NGX All-Share Index increased by 0.92% to close at 51,693.08 points on Monday, as the Consumer Goods sectors recorded gains.

EGX

EGX 30 Index increased by 0.59% and closed at 16,096.87 points on Monday, as the market gained LE 2 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.94% to close at 738.47 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.93%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.52%
NGX Nigerian Stock Exchange	▲	0.92%
EGX Egyptian Stock Exchange	▲	0.59%
ESG Casablanca Stock Exchange	▲	0.94%

African Markets

Nigeria: NGX 30 Index increased by 0.88% to close at 1,860.71 points on Monday. United Capital and Nigerian Breweries were the top gainers.

Egypt: EGX 30 Index increased by 0.59% and closed at 16,096.87 points on Monday, as the market gained LE 2 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.32% and closed at 1,710.71 points on Monday. Stanbic Holdings and Centum Investment Company were the top gainers.

South Africa: JSE Top 40 Index surged by 2.00% and closed at 72,223.31 points on Monday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.47%
Exchange Rate	₦ 451.58
INTERBANK RATES	
OPR	10.17 ▼
Overnight	10.83 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.27% to close at 10,170.37 points on Monday, as losses in the Utilities, Industrials, and Financials sectors pushed shares lower. MSCI UAE increased by 0.24% to close at 410.12 points.

Vietnam: VN-30 Index increased by 0.35% to close at 1,061.14 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.59% to close at 648.79 points.

Saudi Arabia: Tadawul All Share Index jumped by 1.05% to close at 10,647.18 points on Monday, as gains in the Food & Beverages, Materials, and Commercial & Professional Svc led shares higher. MSCI Saudi Arabia climbed by 1.25% to close at 1,483.65 points.

India: Nifty 50 Index jumped by 1.35% to close at 18,101.20 points on Monday, as gains in the Bank, IT, and Financial Services sectors led shares higher. MSCI India climbed by 1.37% to close at 2,069.56 points.

News

Nigeria:

Airtel gets 5G licence, Mafab begins test-run
N3.2bn allocated to industrial parks' takeoff – NASENI
Oil Price May Rise as EU Sanctions On Russian Oil Set to Begin February

Kenya:

Kenya's food imports bill hits 5-year high on biting drought
Weak shilling inflates KenGen debt by Sh3.2 billion
Safaricom to lose Sh2bn in call tariff cut

Abu Dhabi:

EAD contributes to enhancement of sustainability in Abu Dhabi
Dubai's DIFC hosts firms with \$450bn asset portfolio
Dubai real estate: \$593m of property deals on Monday

Saudi Arabia:

Saudi Crown Prince adds \$50bn Diriyah project to PIF's portfolio
Zain KSA completes sale of tower assets to Saudi's PIF for \$803mln
KSA's growth in 2023 to be fueled by non-oil and oil sector activity

Egypt:

Egypt issues new resolution to rationalize spending amid economic crisis
EBRD grants \$1.3B to Egypt for green energy projects
Egypt invests EGP 2.1B in water, sewage projects in Fayoum during 2022

South Africa:

E-grocery in SA to grow over next 7 years as inflation subsides
2022 new vehicle sales fall just short of pre-Covid levels
Apex Group completes purchase of Maitland International

India:

TCS revenue rises 13.5% to over \$7billion in December quarter
Bond yields drop tracking US peers, 7.30% level stays key
India's fuel demand hits nine-month high in December

Vietnam:

Standard Chartered forecast Viet Nam 2023 GDP growth at 7.2%
Over US\$549 mn invested in HCM's export processing, industrial zones
\$448M bond payouts loom for property firms in Jan

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,170.37	-0.3%	-0.3%	-0.4%	-0.4%	AED/USD	3.67	0.0%	0.0%
Egypt	16,096.87	0.6%	0.6%	10.3%	10.3%	EGP/USD	27.60	1.7%	11.7%
India	18,101.20	1.4%	1.4%	0.0%	0.0%	INR/USD	82.18	-0.1%	-0.7%
Kenya	1,710.71	0.3%	0.3%	2.1%	2.1%	KES/USD	123.70	0.0%	0.2%
Nigeria	1,860.71	0.9%	0.9%	1.0%	1.0%	NGN/USD	450.05	0.0%	0.4%
Saudi Arabia	10,647.18	1.0%	1.1%	1.6%	1.6%	SAR/USD	3.76	0.0%	0.0%
South Africa	72,223.30	2.0%	2.0%	7.9%	7.9%	ZAR/USD	16.88	-1.3%	-0.8%
Vietnam	1,061.14	0.4%	0.4%	5.6%	5.6%	VND/USD	23,452.00	-0.1%	-0.8%

MSCI Emerging Markets

MSCI Frontier	483.16	1.0%	1.0%	2.3%	2.3%	Brent Crude (\$)	79.65	1.4%	-7.3%
MSCI Frontier 100	1,116.55	0.6%	0.6%	2.4%	2.4%	Gold (\$)	1,877.80	0.4%	2.8%
MSCI Emerging	1,013.50	2.5%	2.5%	6.0%	6.0%	Copper (\$)	8,859.50	3.1%	5.8%
MSCI World (USD)	2,663.17	0.5%	0.5%	2.3%	2.3%	Coffee (\$)	152.10	-1.1%	-2.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Airtel Africa	1630.00	5.2%	-0.3%	1026.71	UBN	6.35	-8.6%	-0.8%	1.34
United Capital	15.00	4.9%	7.1%	73.12	Wema	3.58	-8.2%	-8.2%	2.01
Nigerian Breweries	47.90	1.9%	16.8%	32.56	Stanbic IBTC	32.00	-4.3%	-4.3%	101.10
FBNH	11.20	0.4%	2.8%	222.86	Axamansard	2.10	-1.4%	5.0%	2.87
					Guaranty	23.70	-1.3%	3.0%	197.48
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	3.58	3.58	0.0%	2.01	Unilever	11.60	10.50	10.5%	1.37
Total	193.00	193.00	0.0%	65.27	Nascon	10.50	9.00	16.7%	4.78
Seplat Petroleum	1100.00	1100.00	0.0%	5.71	Cap	17.80	15.25	16.7%	0.88
P Z Cussons	10.00	10.00	0.0%	5.49	Sterling	1.40	1.13	23.9%	119.25
Presco	137.50	137.50	0.0%	10.81	Stanbic IBTC	32.00	24.50	30.6%	101.10

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ESHRAQ INVESTMENTS	0.53	3.1%	8.6%	36.23	Abu Dhabi National Co. for Building Materials	0.19	-7.5%	1.1%	0.00
Emirates Telecom. Group Company	23.50	3.1%	2.8%	50.10	Aram Group	2.10	-6.3%	-5.8%	0.03
Sudatel Telecom Group Co Ltd	0.53	2.9%	14.1%	2.31	National Corp for Tourism & Hotels	2.85	-4.7%	-5.0%	0.03
RAK Co. for White Cement & Construction Materials	1.79	2.9%	0.0%	0.02	Abu Dhabi Ship Building Co.	3.84	-4.5%	-6.3%	1.97
Abu Dhabi Ports Company	6.05	2.5%	5.4%	44.94	ESG EMIRATES STALLIONS GROUP	7.49	-4.0%	-3.5%	10.99
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%	21.19
Al Fujairah National Insurance Co.	210.00	0.00	0.0%	0.00	AL KHALEEL 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	Sawaed Holding	6.70	6.70	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn EE)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn EE)
Palm Hills Development Com.	2.35	6.3%	13.0%	237.71	Ibsinsa Pharma	8.59	-3.2%	-12.3%	8.59
Commercial International Bank	9.80	3.7%	15.8%	12.89	Fawry For Banking Technology And Electronic Payment	5.80	-3.0%	8.2%	62.27
Cleopatra Hospital Company	46.60	2.2%	12.3%	202.03	Cairo For Investment And Real Estate Development	13.08	-2.2%	0.6%	26.64
Medinet Nasr Housing	161.02	1.6%	13.1%	14.39	E-finance For Digital and Financial Investments	18.90	-2.1%	5.7%	152.59
Orascom Construction	10.95	1.5%	5.3%	25.36	Telecom Egypt	25.79	-2.0100%	-4.4%	2.83
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn EE)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn EE)
Telecom Egypt	25.79	25.79	0.0%	25.53	Commercial International Bank	9.80	9.80	0.0%	12.89
T M G Holding	10.24	10.24	0.0%	10.00	Egyptian Kuwaiti Holding-	13.60	13.60	0.0%	66.39
Sidi Kerir Petrochemicals	15.50	15.50	0.0%	15.40	Ezz Steel	5.90	5.90	0.0%	229.05
Palm Hills Development Co.	2.35	2.35	0.0%	237.71	Housing & Development Bank	2.11	2.11	0.0%	21.50
Medinet Nasr Housing	161.02	161.02	0.0%	14.39	Juhayna Food Industries	3.55	3.55	0.0%	120.01

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1310.10	3.6%	4.9%	4737.714	Titan Company	2489.95	-1.9%	-4.1%	5785.56
SBI Life Insurance	1310.20	3.2%	6.4%	1856.73	Bajaj Finserv	1412.00	-1.3%	-8.8%	6427.69
Indusind Bank	1218.00	3.1%	-0.2%	3441.06	Grasim Industries	1669.00	-0.7%	-3.2%	1097.25
Tata Consultancy Svs.	3309.00	3.0%	1.6%	9521.59	Bajaj Auto	3619.00	-0.6%	0.1%	726.13
Hcl Technologies	1064.00	3.0%	2.4%	4837.25	HDFC Life Insurance Company Ltd	608.00	-0.6%	7.4%	2416.22
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	957.10	970.00	-1.33%	6698.00	Tata Motors	388.95	366.20	6.2%	5728.40
SBI Life Insurance	1310.20	1340.35	-2.2%	1856.73	Tech Mahindra	1013.00	943.70	7.3%	2221.91
State Bank Of India	608.45	629.55	-3.4%	5381.24	Divi's Laboratories itd	3459.00	3195.15	8.3%	570.55
Britannia Inds.	4357.55	4537.00	-4.0%	742.14	Infosys	1485.50	1355.00	9.6%	16991.88
Larsen & Toubro	2114.55	2211.60	-4.4%	3904.50	Kotak Mahindra Bank	1812.05	1631.00	11.1%	6187.00

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	107.50	5.1%	5.4%	0.05	Nairobi Securities Exchange Plc	6.86	-1.7%	1.2%	0.02
Centum Investment Company Plc	8.56	2.9%	2.4%	0.96	Nation Media Group	16.00	-1.5%	0.3%	0.16
Standard Chartered Bank Kenya Ltd	153.75	2.2%	7.7%	1.57	Bamburi Cement Limited	31.00	-1.4%	-1.6%	0.16
Diamond Trust Bank Limited	53.00	1.9%	6.0%	0.37	WPP Scangroup Plc	3.00	-0.7%	-0.3%	0.21
Kenya Reinsurance Corporation Ltd	1.92	1.6%	4.9%	0.02	Safaricom Plc	23.35	-0.6%	-3.3%	87.25
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	153.75	153.75	0.0%	1.57	Kengen Limited	3.23	3.23	0.0%	0.39
NCBA Group Plc	40.00	40.00	0.0%	24.44	Nation Media Group	16.00	15.40	3.9%	0.16
Stanbic Holdings	107.50	107.50	0.0%	0.05	Nairobi Securities Exchange Plc	6.86	6.50	5.5%	0.02
Absa Bank Kenya	12.10	12.95	-6.6%	2.04	Safaricom Plc	23.35	22.00	6.1%	87.25
Total Kenya Ltd	23.95	26.40	-9.3%	0.15	Bamburi Cement Limited	31.00	29.10	6.5%	0.16

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tihama Advertising and Public Relations Co.	76.00	9.9%	113.4%	41.86	Raydan Food Co.	23.44	-3.0%	12.3%	25.82
Saudi Arabian Amiantit Co.	39.00	5.4%	20.0%	27.09	Arab National Bank	31.05	-2.2%	-3.1%	72.46
Saudi Arabian Mining Co.	74.00	4.5%	14.4%	169.04	Alinma Tokio Marine Co.	12.24	-2.1%	2.0%	7.51
Saudi Arabian Mining Co.	74.00	4.5%	14.4%	169.04	Abdullah Saad Mohammed Abo Moati for Bookstores Co.	27.60	-1.8%	8.4%	12.22
Saudi Fisheries Co.	29.75	4.4%	10.6%	66.68	National Company for Learning and Education	74.30	-1.7%	8.8%	5.05
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.	170.80	170.80	0.0%	28.44	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.	40.95	40.95	0.0%	6.68
Saudi Tadawul Group Holding Co.	180.00	180.00	0.0%	48.06	Alandalus Property Co.	0.00	0.00	0.0%	0.00
ACWA POWER Co.	159.00	159.00	0.0%	17.82	Amana Cooperative 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)
SPAR Group Ltd	12825.00	4.0%	13.0%	28599.75	British American Tobacco PLC	67882.00	-2.0%	0.7%	92998.34
Naspers Ltd	326172.00	3.9%	15.5%	263661.14	Anglo American Platinum Ltd	152261.00	-0.3%	6.9%	43261.92
Sanlam Ltd	5296.00	3.7%	8.7%	21131.04					
Absa Group Ltd	20153.00	3.6%	3.9%	31640.21					
Prosus NV	135305.00	3.5%	14.9%	124480.60					
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	10884.00	10935.00	-0.5%	6708.35	Clicks Group Ltd	28268.00	26993.00	4.7%	13793.09
Investec PLC	10948.00	11000.00	-0.5%	12699.68	Vodacom Group Ltd	12416.00	11562.00	7.4%	9291.64
The Bidvest Group Ltd	22104.00	23636.00	-6.5%	11301.33	Mr Price Group Ltd	16600.00	15422.00	7.6%	21414.00
Glencore PLC	11188.00	12259.00	-8.7%	49674.72	Aspen Pharmacare Holdings Ltd	14278.00	12889.00	10.8%	14563.56
British American Tobacco PLC	67882.00	74444.00	-8.8%	92998.34	SPAR Group Ltd/The	12825.00	11350.00	13.0%	28599.75

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietcombank	86900.00	3.5%	8.6%	142.861,75	Phat Dat Real Estate Development Corp	14250.00	-3.4%	4.8%	127.131,63
Viet Nam International Commercial Joint Stock Bank	21150.00	2.7%	11.3%	96.938,97	Mobile World Inv. Corp	42000.00	-2.7%	-2.1%	113.344,41
No Va Land Invest	13850.00	1.8%	-1.1%	139.290,08	Vingroup JSC	55000.00	-2.0%	2.2%	66.948,20
Ho Chi Minh City Devp	16750.00	1.8%	5.0%	20.356,28	Bank for Inv. and Devp	41000.00	-1.6%	6.2%	54.901,85
Vietnam JSC Bank	29100.00	1.8%	6.8%	123.264,52	PetroVietnam Power Corp	11600.00	-1.3%	8.9%	100.836,55
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	80700.00	87004.15	-7.2%	75.949,08	Vietnam Rubber Group	14400.00	14400.00	0.0%	25.066,18
Saigon Beer Alcohol Beverage Corp.	179600.00	197900.00	-9.2%	8.433,67	Mobile World Inv. Corp	42000.00	42000.00	0.0%	113.344,41
Vietcombank	86900.00	96000.00	-9.5%	142.861,75	No Va Land Invest	13850.00	13850.00	0.0%	139.290,08
Bank for Inv. and Devp	41000.00	49950.00	-17.9%	54.901,85	Phat Dat Real Estate Development Corp	14250.00	14250.00	0.0%	127.131,63
FPT Corp	80300.00	97944.43	-18.0%	41.608,08	BaoViet Holdings	47900.00	46600.00	2.8%	9.043,97

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