

# Daily Market Report

30 January 2023

## JSE

JSE All-Share Index increased by 0.35% and closed at 80,791.36 points on Friday, as the Consumer Services and Energy sectors recorded gains.

## BRVM

BRVM composite Index decreased by 0.35% and closed at 198.52 points on Friday, with Crown Siem Côte d'Ivoire and Sogb Côte d'Ivoire being the top losers.

## NSE

NGX All-Share Index was down by 0.18% to close at 52,657.88 points on Friday, as the Consumer Goods and Banking sectors recorded losses.

## EGX

EGX 30 Index surged by 3.69% and closed at 17,411.46 points on Sunday, as the market gained LE 29.93 billion of market cap, amid Egyptian and Arab buying.

## ESG

Casablanca ESG 10 Index decreased by 0.28% to close at 764.41 points on Friday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	0.35%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.35%
<b>NGX</b> Nigerian Stock Exchange	▼	0.18%
<b>EGX</b> Egyptian Stock Exchange	▲	3.69%
<b>ESG</b> Casablanca Stock Exchange	▼	0.28%

## African Markets

**Nigeria:** NGX 30 Index decreased by 0.34% to close at 1,897.57 points on Friday. International Breweries and Access were the top losers.

**Egypt:** EGX 30 Index surged by 3.69% and closed at 17,411.46 points on Sunday, as the market gained LE 29.93 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index increased by 0.50% and closed at 1,674.24 points on Friday. Diamond Trust Bank Limited and Nation Media Group were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.38% and closed at 74,766.05 points on Friday, as the Consumer Services and Energy sectors recorded gains.

## Nigeria Key Indicators

	Current
Inflation	21.34%
Exchange Rate	₦ 460.78
<b>INTERBANK RATES</b>	
OPR	10.50 ↔
Overnight	11.00 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index fell by 2.63% to close at 9,737.59 points on Friday, as losses in the Real Estate, Industrials, and Financials sectors pushed shares lower. MSCI UAE fell by 3.53% to close at 391.81 points.

**Vietnam:** VN-30 Index increased by 0.78% to close at 1,130.65 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.86% to close at 686.07 points.

**Saudi Arabia:** Tadawul All Share Index was up by 0.16% to close at 10,839.49 points on Sunday, as gains in the Transportation, Food & Beverages, and Banks sectors led shares higher. MSCI Saudi Arabia inched up by 0.02% to close at 1,499.46 points.

**India:** Nifty 50 Index dropped by 1.61% to close at 17,604.35 points on Friday, as losses in the Bank, IT, and Media sectors pushed shares lower. MSCI India fell by 2.11% to close at 1,987.13 points.

## News

### Nigeria:

Scholz seals energy deals with UAE  
UAE big businesses first to sign up for Corporate Tax  
Dubai invests \$2.2bn in local electricity projects

### Kenya:

Forex reserves at 88-month low as debt repayments fall due  
Kenya Power gets Sh25bn loans repayment reprieve  
KenGen Declares KES 1.32 bn Dividend Payout to Shareholders

### Abu Dhabi:

Scholz seals energy deals with UAE  
UAE big businesses first to sign up for Corporate Tax  
Dubai invests \$2.2bn in local electricity projects

### Saudi Arabia:

Saudi Arabia plans to boost listing of agricultural firms on Tadawul  
Saudi Cenomi Retail plans to divest 26 brands to focus on key offerings  
King Abdullah Port records 3.25% growth in container throughput

### Egypt:

Egypt's economy expected to grow by 4.8% in the current fiscal year  
Egypt's development coop portfolio with World Bank reach \$17B  
Egypt to make EGP 13.3B investment in Matrouh in FY 2022/23

### South Africa:

Interest rate hike places pressure on SA's most credit stressed  
Equites to spend R3.21bn on logistics projects to meet demand  
Truworths' shares leap as sales grow in spite of load shedding

### India:

Indirect levies generate 53% of govt tax revenue  
NTPC net profit up nearly 5% at Rs 4,854 crore in Q3  
Adani's 413-page reply to Hindenburg after \$51 billion wipeout

### Vietnam:

January's CPI increases 0.52% due to high Tet demand  
Foreign suppliers pay 1.8 trillion VND in taxes  
January FDI nears 1.7 billion USD

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,737.59	-2.6%	0.0%	-4.6%	-4.6%	AED/USD	3.67	0.0%	0.0%
Egypt	17,411.46	3.7%	3.7%	19.3%	19.3%	EGP/USD	29.88	-0.1%	20.9%
India	17,604.35	-1.6%	0.0%	-2.8%	-2.8%	INR/USD	81.51	0.1%	-1.5%
Kenya	1,674.24	0.5%	0.0%	-0.1%	-0.1%	KES/USD	124.45	0.1%	0.8%
Nigeria	1,897.57	-0.3%	0.0%	3.0%	3.0%	NGN/USD	460.28	0.0%	2.7%
Saudi Arabia	10,839.49	0.2%	0.2%	3.4%	3.4%	SAR/USD	3.75	0.0%	-0.1%
South Africa	74,766.05	0.4%	0.0%	11.7%	11.7%	ZAR/USD	17.20	0.2%	1.1%
Vietnam	1,130.65	0.8%	0.0%	12.5%	12.5%	VND/USD	23,467.50	0.1%	-0.7%

## MSCI Emerging Markets

MSCI Frontier	495.19	0.2%	0.0%	4.8%	4.8%	Brent Crude (\$)	86.66	-0.9%	0.9%
MSCI Frontier 100	1,142.81	0.1%	0.0%	4.8%	4.8%	Gold (\$)	1,945.60	-0.1%	6.5%
MSCI Emerging	1,051.19	-0.1%	0.0%	9.9%	9.9%	Copper (\$)	9,263.50	-0.7%	10.6%
MSCI World (USD)	2,785.84	0.3%	0.0%	7.0%	7.0%	Coffee (\$)	164.14	1.9%	5.1%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Cap	19.55	9.8%	9.8%	6.85	International Breweries	4.60	-6.1%	-2.1%	2.60
UBN	6.60	3.1%	3.1%	2.35	Access	9.00	-4.3%	5.9%	26.18
Sterling	1.58	1.9%	12.9%	2.87	Guinness	70.00	-3.7%	1.0%	127.50
Stanbic IBTC	33.50	1.5%	0.1%	55.86	Cadbury	11.55	-2.5%	-2.9%	5.01
Fidelity	5.40	1.3%	24.1%	145.13	MTNN	225.00	-1.7%	4.7%	407.50
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	4.15	4.15	0.0%	4.57	Nascon	10.60	9.00	17.8%	0.67
Wema	4.00	4.00	0.0%	3.04	Unilever	13.25	10.50	26.2%	55.85
Total	224.00	224.00	0.0%	32.99	Cap	19.55	15.25	28.2%	6.85
Seplat Petroleum	1100.00	1100.00	0.0%	3.94	Custodian	6.00	4.55	31.9%	21.93
P Z Cussons	10.25	10.25	0.0%	7.88	Guaranty	24.45	18.00	35.8%	211.93

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Co. for White Cement & Construction Materials	1.69	5.0%	-5.6%	0.06	FOODCO NATIONAL FOODSTUFF	3.81	-9.9%	51.2%	0.03
The National Bank of Ras Al Khaimah	4.75	3.3%	1.1%	1.30	Commercial Bank International	0.77	-9.9%	-9.9%	0.03
Gulf Pharmaceutical Industries	1.09	0.9%	-6.0%	0.06	Ras Al Khaimah Poultry & Feeding Co.	1.58	-9.7%	-1.9%	0.00
National Corp for Tourism & Hotels	2.76	0.4%	-8.0%	0.47	Arkan Building Materials Company	1.50	-8.5%	-5.7%	16.23
GHITHA HOLDING	71.30	0.3%	-2.3%	36.32	Abu Dhabi National Energy Company	3.12	-8.2%	-9.0%	41.78
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 Seer Marine Supplies & Equipment Co.	8.60	8.60	0.0%	10.37
Al Fujairah National Insurance Co.	210.00	210.00	0.0%	0.00	Q Holding	3.43	3.43	0.0%	10.12
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	Sawaheed 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£)
Ibsinsa Pharma	10.69	10.1%	9.2%	68.53	GB AUTO	11.18	-1.7%	40.5%	95.10
ELSWEDY ELECTRIC	26.30	7.4%	13.1%	45.78	Cairo For Investment And Real Estate Development	13.86	-0.6%	6.6%	1.04
Citadel Capital	5.90	7.3%	10.9%	33.69	Egyptian Financial Group	34.88	-0.3%	10.7%	3.98
Commercial International Bank	10.64	6.4%	25.8%	41.45					
Cleopatra Hospital Company	54.00	6.1%	30.2%	285.76					
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	27.99	27.99	0.0%	24.46	Commercial International Bank	10.64	10.64	0.0%	41.45
T M G Holding	10.96	10.96	0.0%	10.68	Egyptian Kuwaiti Holding	13.65	13.65	0.0%	88.78
Sidi Kerir Petrochemicals	16.60	16.60	0.0%	16.30	Ezz Steel	6.71	6.71	0.0%	64.99
Qatar National Bank Alahly	20.62	20.62	0.0%	4.35	Housing & Development Bank	1.95	1.95	0.0%	6.29
Palm Hills Development Co.	2.37	2.37	0.0%	102.54	Juhayna Food Industries	3.90	3.90	0.0%	143.01

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	445.25	6.3%	14.8%	28185.904	Adani Enterprises Limited	2768.50	-18.3%	-28.2%	44445.92
Bajaj Auto	3941.00	6.0%	9.0%	9362.68	Adani Ports And Sez.	604.50	-15.2%	-26.1%	39549.95
Dr Reddys Lab	4312.45	2.7%	1.8%	4133.83	State Bank Of India	542.00	-4.7%	-11.7%	22012.79
ITC	345.50	1.8%	4.2%	7269.16	Icici Bank	818.25	-4.3%	-8.1%	32708.34
Cipla	1049.95	1.4%	-2.4%	3103.98	Indusind Bank	1110.80	-3.9%	-9.0%	5395.45
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Sun Pharma Industries	1038.00	1070.95	-3.1%	3592.55	Kotak Mahindra Bank	1713.00	1631.00	5.0%	12937.77
Mahindra & Mahindra	1320.00	1366.55	-3.4%	2517.06	Divi's Laboratories Ltd	3378.00	3195.15	5.7%	1102.62
Britannia Inds.	4378.55	4537.00	-3.5%	1493.55	Asian Paints	2725.00	2560.00	6.4%	4894.87
ITC	345.50	361.45	-4.4%	7269.16	Wipro	399.00	372.40	7.1%	1477.28
HUL	2607.55	2741.60	-4.9%	4112.48	Reliance Industries	2339.00	2180.00	7.3%	27866.87

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	51.25	2.5%	2.5%	0.64	Stanbic Holdings	112.00	-1.8%	9.8%	1.25
Nation Media Group	15.10	2.4%	-5.3%	0.13	WPP Scangroup	2.99	-0.3%	-0.7%	1000.00
Total Kenya Ltd	23.30	2.2%	-2.3%	0.01	Equity Group Holdings Plc	45.40	-0.3%	2.0%	25.75
East African Breweries Limited	172.00	1.9%	2.7%	7.24	Kengen Limited	3.07	-0.3%	-4.7%	0.34
Kenya Power & Lighting Limited	1.55	1.3%	-0.6%	0.35	Standard Chartered Bank Kenya Ltd	157.00	-0.2%	10.0%	2.78
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	157.00	159.00	-1.3%	2.78	Kengen Limited	3.07	3.07	0.0%	0.34
Stanbic Holdings	112.00	114.00	-1.8%	1.25	Nairobi Securities Exchange	6.40	6.40	0.0%	0.33
Absa Bank Kenya	12.45	12.95	-3.9%	2.80	Kenya Reinsurance Corporation Ltd	1.80	1.78	1.1%	0.03
NCBA Group	37.00	40.00	-7.5%	1.43	Bamburi Cement Ltd	29.50	29.05	1.5%	0.09
The Coop Bank of Kenya Ltd	12.60	14.00	-10.0%	0.77	Nation Media Group	15.10	14.75	2.4%	0.13

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Abdulmohsen Alhokair Group for Tourism and Development	24.76	7.7%	38.3%	35.57	Development Works Food Co.	165.80	-3.3%	7.8%	20.41
Halwani Bros. Co.	57.80	7.6%	30.5%	29.94	ACWA POWER Co.	150.80	-3.1%	-0.8%	38.66
Al Sagr Cooperative Insurance Co.	16.14	5.4%	15.0%	13.28	Saudi Industrial Investment Group	24.26	-2.8%	10.4%	18.06
Saudi Arabian Amiantit Co.	44.00	4.5%	35.4%	33.97	Tihama Advertising and Public Relations Co.	93.80	-2.8%	40.0%	18.61
East Pipes Integrated Company for Industry	46.50	4.0%	24.7%	11.78	Maharah Human Resources Co.	53.40	-2.4%	3.7%	12.80
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)
Elm Co.	344.00	344.00	0.0%	18.43	Al Alamiya for Coop Insurance Co.	13.26	13.26	0.0%	3.00
Saudi Tadawul Group Holding Co.	165.00	165.00	0.0%	35.26	Alkhabeer REIT Fund	7.58	7.58	0.0%	3.61
ACWA POWER Co.	150.80	150.80	0.0%	38.66	Allied Cooperative Insurance Group	11.70	11.70	0.0%	2.67
Arabian Internet and Communications Services Co.	242.80	242.80	0.0%	11.18	Arabian Centres Co.	0.00	0.00	0.0%	0.00
Theeb Rent a Car Co	67.80	67.80	0.0%	3.72	CHUBB Arabia Coop Insurance Co.	17.70	17.70	0.0%	4.96

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Old Mutual Ltd	1196.00	2.0%	14.3%	16468.92	Gold Fields Ltd	20449.00	-2.6%	16.1%	65232.31
Exxaro Resources Ltd	22490.00	1.9%	3.5%	35309.30	Clicks Group Ltd	25883.00	-2.1%	-4.2%	40377.48
MultiChoice Group	12043.00	1.6%	2.7%	14090.31	Shoprite Holdings Ltd	23976.00	-1.9%	6.1%	32127.84
Prosus NV	147000.00	1.4%	24.8%	183750.00	AngloGold Ashanti Ltd	36869.00	-1.7%	12.0%	49035.77
Sanlam Ltd	5641.00	1.2%	15.8%	24369.12	Woolworths Holdings Ltd	7670.00	-1.5%	15.5%	32750.90
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	11247.00	11247.00	0.0%	11247.00	Clicks Group Ltd	25883.00	25883.00	0.0%	40377.48
Investec Ltd	11115.00	11115.00	0.0%	4144.67	Vodacom Group Ltd	12187.00	11562.00	5.4%	24617.74
The Bidvest Group Ltd	22471.00	23636.00	-4.9%	20223.90	Clicks Group Ltd	16373.00	15422.00	6.2%	16864.19
Glencore	11665.00	12288.00	-5.1%	80021.90	Aspen Pharmacare Holdings Ltd	14268.00	12889.00	10.7%	12444.41
British American Tobacco	64622.00	74444.00	-13.2%	52678.56	SPAR Group Ltd	13514.00	11350.00	19.1%	17433.06

## 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.	193100.00	4.0%	15.7%	25.799,54	Phat Dat Real Estate Development Corp	13700.00	-3.2%	0.7%	94.722,00
Petrovietnam Gas	108200.00	3.5%	6.6%	57.565,73	Bank for Inv. and Devp	44550.00	-3.1%	15.4%	78.766,59
Vietnam Rubber Group	16850.00	3.4%	22.1%	43.653,90	Vietnam JSC Bank	30350.00	-2.4%	11.4%	105.814,18
Vingroup	59200.00	3.1%	10.0%	129.472,95	Vinamilk	80000.00	-1.6%	5.1%	188.041,24
BaoViet Holdings	51000.00	2.2%	9.4%	36.261,01	Saigon Securities Inc	20950.00	-1.2%	18.4%	411.367,20
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)
Saigon Beer Alcohol Beverage Corp.	193100.00	197900.00	-2.4%	25.799,54	Vietnam Rubber Group	16850.00	16850.00	0.0%	43.653,90
Vietcombank	93000.00	96000.00	-3.1%	144.862,16	Mobile World Inv. Corp	45900.00	45900.00	0.0%	115.018,97
Vinamilk	80000.00	87004.15	-8.1%	188.041,24	No Va Land Invest	13950.00	13950.00	0.0%	164.002,02
Asia Commercial JS Bank	26350.00	29080.00	-9.4%	98.987,12	Phat Dat Real Estate Development Corp	13700.00	13700.00	0.0%	94.722,00
Bank for Inv. and Devp	44550.00	49950.00	-10.8%	78.766,59	BaoViet Holdings	51000.00	46600.00	9.4%	36.261,01

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