

Daily Market Report

3 February 2023

JSE

JSE All-Share Index inched down by 0.02% and closed at 79,802.09 points on Thursday, as the Industrial and Materials sectors recorded losses.

BRVM

BRVM composite Index increased by 0.001% and closed at 200.76 points on Thursday, with Sode Côte d'Ivoire and Sucroivre Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index increased by 0.93% to close at 53,998.12 points on Thursday, as the Oil & Gas sector recorded gains.

EGX

EGX 30 Index declined by 0.93% and closed at 16,255.73 points on Thursday, as the market lost LE 11.05 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index climbed by 1.49% to close at 788.93 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.02%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.001%
NGX Nigerian Stock Exchange	▲	0.93%
EGX Egyptian Stock Exchange	▼	0.93%
ESG Casablanca Stock Exchange	▲	1.49%

African Markets

Nigeria: NGX 30 Index increased by 0.91% to close at 1,937.11 points on Thursday. Seplat and FCMB were the top gainers.

Egypt: EGX 30 Index declined by 0.93% and closed at 16,255.73 points on Thursday, as the market lost LE 11.05 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index was up by 0.13% and closed at 1,658.33 points on Thursday. Nairobi Securities Exchange and WPP Scangroup were the top gainers.

South Africa: JSE Top 40 Index was down by 0.13% and closed at 73,629.31 points on Thursday, as the Industrial and Materials sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.34%
Exchange Rate	₦ 461.04
INTERBANK RATES	
OPR	10.50 ↔
Overnight	10.75 ▼

Other Emerging Markets

Abu Dhabi: ADX Index was up by 0.14% to close at 9,858.42 points on Thursday, as gains in the Real Estate, Utilities, and Energy sectors led shares higher. MSCI UAE increased by 0.26% to close at 399.74 points.

Vietnam: VN-30 Index increased by 0.50% to close at 1,093.48 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.54% to close at 656.03 points

Saudi Arabia: Tadawul All Share Index declined by 0.76% to close at 10,701.79 points on Thursday, as losses in the Food & Beverages, Food & Staples Retailing, and Retailing sectors pushed shares lower. MSCI Saudi Arabia declined by 0.95% to close at 1,475.52 points.

India: Nifty 50 Index inched down by 0.03% to close at 17,610.40 points on Thursday, as losses in the IT, Pharma and Metal sectors pushed shares lower. MSCI India decreased by 0.33% to close at 1,966.86 points.

News

Nigeria:

External reserves fell by \$64m in January
Insecurity, Naira fluctuation cause Customs N400b shortfall
NNPCL, Daewoo sign N342bn Kaduna refinery rehabilitation deal

Kenya:

Access Bank eyes new acquisition after collapse of Sidian Bank deal
Mawingu Secures KES 1.12 bn to Expand Fixed Internet Services
Tullow earned \$498m from early oil exports

Abu Dhabi:

Abu Dhabi Chamber launches its new strategy for 2023-2025
ADNOC signs Dh17 billion deal with 23 companies
Borouge announces \$400 mln cost savings drive; Q4 profit drops

Saudi Arabia:

SAMA mirrors US Fed 25 bps interest rate hike
Saudi Arabia and France sign cooperation MoU in the field of energy
Saudi ACWA Power completes \$480mln local currency sukuk issue

Egypt:

CBE keeps interest rates unchanged during 2023 first meeting
Egypt's current account deficit drops 20.2% YoY in Q1 FY22/23
Egypt's Cabinet nods to 13 draft oil exploration deals

South Africa:

Manufacturing activity flat on slowing demand & load shedding
Anglo American quarterly copper output jumps more than 50%
Kumba delivers profit warning after rail problems hit exports

India:

HDFC's Q3 net up 13% at Rs 3,691 crore
Adani backers from NY to Tokyo dissect and limit exposure
Rs 30K cr Budget support for oil companies amid fuel losses

Vietnam:

Export target set at 393-394 bn USD in 2023: Ministry
Hanoi, HCMC record highest disbursement of PIC in January
Vietjet reports over 900 billion VND in profit in Q4/2022

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,858.42	0.1%	1.2%	0.5%	-3.5%	AED/USD	3.67	0.0%	0.0%
Egypt	16,255.73	-0.9%	-3.2%	-1.2%	11.4%	EGP/USD	30.28	0.2%	22.6%
India	17,610.40	-0.03%	0.03%	-0.3%	-2.7%	INR/USD	82.05	0.4%	-0.9%
Kenya	1,658.33	0.1%	-1.0%	0.1%	-1.1%	KES/USD	124.70	0.1%	1.0%
Nigeria	1,937.11	0.9%	2.1%	1.3%	5.1%	NGN/USD	460.54	0.0%	2.8%
Saudi Arabia	10,701.79	-0.8%	-1.1%	-0.8%	2.1%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,629.30	-0.1%	-1.5%	0.3%	10.0%	ZAR/USD	17.08	0.2%	0.4%
Vietnam	1,093.48	0.5%	-3.3%	-2.8%	8.8%	VND/USD	23,450.00	0.0%	-0.8%

MSCI Emerging Markets

MSCI Frontier	497.34	1.0%	0.4%	0.8%	5.3%	Brent Crude (\$)	82.17	-0.8%	-4.4%
MSCI Frontier 100	1,143.06	1.0%	0.02%	0.4%	4.8%	Gold (\$)	1,930.80	-0.6%	5.7%
MSCI Emerging	1,045.56	0.3%	-0.5%	1.4%	9.3%	Copper (\$)	9,052.50	-0.4%	8.1%
MSCI World (USD)	2,847.82	1.3%	2.2%	2.3%	9.4%	Coffee (\$)	171.43	-2.0%	9.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Seplat Petroleum	1325.00	9.5%	20.5%	587.89	P Z Cussons	10.25	-4.7%	-9.7%	8.47
FCMB	4.70	6.8%	22.1%	12.83	Custodian	6.00	-1.6%	0.8%	19.93
MTNN	233.50	3.8%	8.6%	116.75	Zenith	25.10	-1.6%	4.6%	233.58
Sterling	1.62	3.2%	15.7%	17.02	Access	9.05	-0.5%	6.5%	32.60
Nascon	10.90	2.8%	-1.8%	1.59	United Capital	14.85	-0.3%	6.1%	49.89
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	4.70	4.70	0.0%	12.83	Nascon	10.90	9.00	21.1%	1.59
Wema	3.92	3.92	0.0%	0.61	Unilever	13.55	10.50	29.0%	3.20
Total	224.00	224.00	0.0%	42.16	Custodian	6.00	4.55	31.9%	19.93
Seplat Petroleum	1325.00	1325.00	0.0%	587.89	Cap	20.30	15.25	33.1%	0.53
P Z Cussons	10.25	10.25	0.0%	8.47	Guaranty	25.05	18.00	39.2%	349.87

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ras Al Khaimah Poultry & Feeding Co.	2.04	14.6%	26.7%	0.05	FOODCO NATIONAL FOODSTUFF	3.51	-10.0%	39.3%	0.01
Aram Group	1.92	8.5%	-13.9%	0.02	HILY HOLDING	4.29	-9.9%	32.0%	0.01
Abu Dhabi National Hotels Co.	5.46	8.1%	42.6%	1.16	Fujairah Building Industries P.	1.85	-5.1%	-5.6%	0.15
ESG EMIRATES STALLIONS GROUP	7.29	4.9%	-6.1%	11.94	Methaq Takaful Insurance Compnay	0.61	-4.0%	-4.9%	0.02
Hayah Insurance Company	0.99	4.2%	2.1%	0.00	Sudatel Telecom Group Co. Ltd	0.46	-2.8%	-0.7%	0.16
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	Bayanat Al	0.00	0.00	0.0%	0.00
Al Fujairah National Insurance Co.	210.00	210.00	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£)
Edita Food Industries S.A.E	16.76	11.0%	20.7%	7.08	Oriental Weavers	10.70	-8.6%	2.9%	38.68
Juhayna Food Industries	10.50	2.7%	7.3%	23.93	GB AUTO	4.58	-6.5%	-14.6%	25.75
Credit Agricole Egypt	9.80	1.2%	15.8%	13.81	ELSWEDY ELECTRIC	12.03	-6.0%	0.2%	63.65
Commercial International Bank	50.60	1.0%	22.0%	195.92	Ezz Steel	22.65	-5.6%	-2.6%	40.58
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.68	0.4%	-9.8%	1.31	Cleopatra Hospital Co.	5.31	-5.5%	22.0%	19.24
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	26.03	26.03	0.0%	34.01	T M G Holding	9.54	6.50	0.0%	54.07
Sidi Kerir Petrochemicals	14.57	14.57	0.0%	47.94	Taaleem Management Services	4.19	2.72	0.0%	0.44
Oriental Weavers	10.70	10.70	0.0%	38.68	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.68	1.62	0.0%	1.31
Orascom Construction PLC	100.15	100.15	0.0%	3.63	Cleopatra Hospital Co.	5.31	3.81	39.4%	19.24
Misir Fertilizers Production Co.	149.87	149.87	0.0%	13.01	Cairo For Investment And Real Estate Development	14.30	9.51	50.4%	27.06

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Britannia Inds.	4587.00	4.9%	6.5%	7557.665	Adani Enterprises Ltd	1565.30	-26.7%	-59.4%	63007.59
ITC	378.80	4.8%	14.3%	21008.13	Adani Ports And Sez.	459.50	-7.2%	-43.8%	53715.62
Indusind Bank	1080.00	3.7%	-11.5%	4763.80	UPL	698.95	-5.8%	-2.4%	5393.46
HUL	2630.05	2.2%	2.7%	5172.97	HDFC Life Insurance Company Ltd	493.00	-4.4%	-12.9%	8524.17
Infosys	1581.00	1.9%	4.8%	10912.07	Eicher Motors	3215.00	-2.7%	-0.4%	1983.65
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Britannia Inds.	4587.00	4596.00	-0.2%	7557.66	HDFC Life Insurance Company Ltd	493.00	483.05	2.1%	8524.17
ITC	378.80	384.70	-1.5%	21008.13	Divi's Laboratories Limited	3268.00	3195.15	2.3%	1105.05
Mahindra & Mahindra	1354.00	1390.00	-2.6%	2753.42	Asian Paints	2708.00	2560.00	5.8%	3550.86
HUL	2630.05	2741.60	-4.1%	5172.97	Reliance Industries	2325.00	2180.00	6.7%	14659.29
Hcl Technologies	1149.00	1215.00	-5.4%	3497.63	Tech Mahindra	1017.00	943.70	7.8%	3943.74

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	6.56	2.8%	-3.2%	0.06	Kengen Limited	2.85	-2.1%	-11.5%	0.28
WPP Scangroup	2.97	2.4%	-1.3%	1000.00	NCBA Group	34.60	-1.1%	-12.1%	0.57
Kenya Power & Lighting Limited	1.56	2.0%	0.0%	1.28	Centum Investment Company	8.70	-0.9%	4.1%	0.49
Standard Chartered Bank Kenya Ltd	158.00	0.6%	10.7%	52.44	Kenya Reinsurance Corporation Ltd	1.79	-0.6%	-2.2%	0.04
Equity Group Holdings	45.30	0.6%	1.8%	3.06	British American Tobacco Kenya Ltd	445.00	-0.5%	-3.3%	100.13
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	158.00	159.00	-0.6%	52.44	Kengen Limited	2.85	2.85	0.0%	0.28
Stanbic Holdings	110.75	114.00	-2.9%	0.00	Kenya Reinsurance Corporation Ltd	1.79	1.78	0.6%	0.04
Absa Bank Kenya	12.40	12.95	-4.2%	0.87	Bamburi Cement Limited	29.20	29.00	0.7%	0.30
East African Breweries Limited	176.25	194.00	-9.1%	0.44	Nation Media Group	14.95	14.75	1.4%	0.28
The Cooperative Bank of Kenya Ltd	12.45	14.00	-11.1%	1.00	Nairobi Securities Exchange	6.56	6.38	2.8%	0.06

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Salama Cooperative Insurance Co.	16.30	5.8%	25.8%	33.24	Alinma Bank	31.55	-4.3%	-3.1%	479.15
Saudi Arabian Cooperative Insurance Co.	13.00	3.7%	9.1%	7.72	Dr. Sulaiman Al Habib Medical Services Group	232.20	-3.3%	5.3%	24.98
Alinma Tokio Marine Co.	16.06	3.1%	33.8%	27.02	Banque Saudi Fransi	39.85	-3.3%	-1.8%	11.22
Taleem REIT Fund	11.64	2.7%	-1.4%	0.95	Saudi Industrial Investment Group	22.90	-3.2%	4.2%	24.15
Lazurde Company for Jewelry	13.50	2.6%	9.4%	42.54	Ethiad Etisalat Co.	34.70	-2.9%	-0.1%	41.86
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.	188.80	188.80	0.0%	11.15	Al Alamiya for Coop Insurance Co.	13.96	13.96	0.0%	4.70
Elm Co.	364.40	364.40	0.0%	45.39	Alkhabeer REIT Fund	7.51	7.51	0.0%	0.98
Saudi Tadawul Group Holding Co.	161.00	161.00	0.0%	20.43	Allied Cooperative Insurance Group	12.60	12.60	0.0%	2.21
ACWA POWER Co.	148.00	148.00	0.0%	35.33	Arabian Centres Co.	0.00	0.00	0.0%	0.00
Arabian Internet and Communications Services Co.	252.00	252.00	0.0%	21.26	CHUBB Arabia Coop Insurance Co.	18.24	18.24	0.0%	4.17

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Clicks Group Ltd	27847.00	3.1%	3.1%	21141.72	British American Tobacco	64767.00	-2.5%	-3.9%	133420.02
Woolworths Holdings Ltd	7758.00	2.9%	16.8%	23041.26	Anglo American	71000.00	-1.2%	7.0%	220810.00
The Bidvest Group Ltd	23484.00	2.7%	9.5%	13455.63	Investec Ltd	11064.00	-1.1%	2.9%	7953.02
Impala Platinum Holdings Ltd	20574.00	2.6%	-3.5%	34975.80	Standard Bank Group Ltd	18069.00	-1.0%	7.7%	81852.57
MTN Group	14685.00	2.1%	15.4%	61383.30	Glencore	11462.00	-0.9%	0.5%	81265.58
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	11064.00	11115.00	-0.5%	7953.02	Vodacom Group Ltd	12420.00	11562.00	7.4%	11178.00
Investec	11187.00	11247.00	-0.5%	13871.88	Clicks Group Ltd	27847.00	25883.00	7.6%	21141.72
The Bidvest Group Ltd	23484.00	23636.00	-0.6%	13455.63	Mr Price Group Ltd	16580.00	15422.00	7.5%	14318.82
Glencore	11462.00	12288.00	-6.7%	81265.58	Aspen Pharmicare Holdings Ltd	14931.00	12889.00	15.8%	9410.56
British American Tobacco	64767.00	74444.00	-13.0%	133420.02	SPAR Group Ltd	14274.00	11350.00	25.8%	16272.36

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Mobile World Inv. Corp	49900.00	5.9%	16.3%	237.151,57	Ho Chi Minh City Devp	18350.00	-3.4%	15.0%	45.974,50
Vincom Retail	28850.00	3.0%	9.7%	48.556,75	No Va Land Invest	14200.00	-2.4%	1.4%	164.520,66
Sai Gon Thuong Tin Commercial	26150.00	2.0%	16.2%	477.320,74	Vietnam Rubber Group	15250.00	-1.9%	10.5%	33.703,19
Vietcombank	90600.00	1.7%	13.3%	88.890,16	Vietjet Aviation	112000.00	-1.7%	2.3%	35.990,58
Masan Group Corp	96700.00	1.6%	4.0%	70.897,98	Phat Dat Real Estate Development Corp	13750.00	-1.1%	1.1%	50.053,04
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.	187500.00	197900.00	-5.3%	16.782,71	Vietnam Rubber Group	15250.00	15250.00	0.0%	33.703,19
Vietcombank	90600.00	96000.00	-5.6%	88.890,16	Mobile World Inv. Corp	49900.00	49900.00	0.0%	237.151,57
Vinamilk	76700.00	87004.15	-11.8%	115.318,31	No Va Land Invest	14200.00	14200.00	0.0%	164.520,66
Bank for Inv. and Devp	43150.00	49950.00	-13.6%	123.204,73	Phat Dat Real Estate Development Corp	13750.00	13750.00	0.0%	50.053,04
Asia Commercial JS Bank	25000.00	29080.00	-14.0%	72.458,91	Vinhomes	47900.00	47200.00	1.5%	104.384,82

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