

Daily Market Report

7 February 2023

JSE

JSE All-Share Index declined by 0.82% and closed at 79,582.83 points on Monday, as the Industrial and Financial sectors recorded losses.

BRVM

BRVM composite Index increased by 0.22% and closed at 200.89 points on Monday, with Bernabe Côte d'Ivoire and Safca Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index increased by 0.29% to close at 54,367.74 points on Monday, as the Industrial, Insurance, and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index climbed by 1.97% and closed at 16,587.06 points on Monday, the market gained LE 9 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index inched up by 0.02% to close at 787.56 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.82%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.22%
NGX Nigerian Stock Exchange	▲	0.29%
EGX Egyptian Stock Exchange	▲	1.97%
ESG Casablanca Stock Exchange	▲	0.02%

African Markets

Nigeria: NGX 30 Index increased by 0.32% to close at 1,952.32 points on Monday. FCMB and MTNN were the top gainers.

Egypt: EGX 30 Index climbed by 1.97% and closed at 16,587.06 points on Monday, the market gained LE 9 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.45% and closed at 1,671.69 points on Monday. NCBA Group Plc and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index declined by 0.80% and closed at 73,489.38 points on Monday, as the Industrial and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.34%
Exchange Rate	₦ 460.92
INTERBANK RATES	
OPR	10.50 ▼
Overnight	10.81 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.71% to close at 10,001.55 points on Monday, as gains in the Telecommunications, Financials, and Real Estate sectors led shares higher. MSCI UAE increased by 0.97% to close at 411.00 points.

Vietnam: VN-30 Index increased by 0.80% to close at 1,094.37 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.81% to close at 662.61 points.

Saudi Arabia: Tadawul All Share Index inched down by 0.03% to close at 10,555.71 points on Monday, as losses in the Consumer Durables & Apparel, Media and Entertainment, and Retailing sectors pushed shares lower. MSCI Saudi Arabia was down by 0.10% to close at 1,452.66 points.

India: Nifty 50 Index decreased by 0.50% to close at 17,764.60 points on Monday, as losses in the Bank, IT and Metal sectors pushed shares lower. MSCI India decreased by 0.42% to close at 1,973.41 points.

News

Nigeria:

Outlook for Nigeria's Upstream Oil, Gas Sector Positive for 2023
MPR: Tier-2 Banks Spent N413.5bn on Deposit, Borrowings
Stanbic IBTC pledges support for businesses

Kenya:

Current account deficit falls, exports, remittances up
Private Sector Activity Jumps in January-PMI
Business Confidence in Kenya Rises Despite Rising Taxes-PMI

Abu Dhabi:

Abu Dhabi hospital operator Burjeel in Saudi alliance
Abu Dhabi Islamic Bank launches Customer Majlis Initiative
Gulf Navigation's 2022 net profit drops to Dh5.75m from Dh59.5m

Saudi Arabia:

Saudi Arabia says tech giants to invest more than \$9bn in kingdom
Aramco announces deal with Zoom at LEAP 2023
Saudi expands its mineral exploration with 377 mining complexes

Egypt:

Egypt, Romania pen MoU to bolster coop in science, tech research
EFG Hermes expects Egypt's FY22/23 current a/c deficit at 3.7%
Value of Egyptian exports to Croatia grows by 304.8% in 1 year

South Africa:

Business optimism slips to six-month low
Sibanye's lithium project in Finland secures environmental permit
Implats expects higher interim earnings despite load shedding

India:

Adani founders prepay \$1.1 billion loans in bid to stem stock rout
IL&FS to give ₹3,200 crore to financial services arm's creditor's
Russia accounts for 28% of India's oil imports in January

Vietnam:

Import-export turnover reaches 46.56 billion USD in January
HCM City's retail market enjoys growth in January
Hai Duong targets 400 million USD in FDI in 2023

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,001.55	0.7%	0.7%	1.9%	-2.1%	AED/USD	3.67	0.0%	0.0%
Egypt	16,587.06	2.0%	2.0%	0.9%	13.6%	EGP/USD	30.19	0.1%	22.2%
India	17,764.60	-0.5%	-0.5%	0.6%	-1.9%	INR/USD	82.76	0.3%	0.0%
Kenya	1,671.69	0.5%	0.5%	0.9%	-0.3%	KES/USD	124.90	0.1%	1.1%
Nigeria	1,952.32	0.3%	0.3%	2.1%	6.0%	NGN/USD	459.70	-0.2%	2.6%
Saudi Arabia	10,555.71	-0.03%	-1.4%	-2.2%	0.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,489.37	-0.8%	-0.8%	0.1%	9.8%	ZAR/USD	17.67	1.2%	3.8%
Vietnam	1,094.37	0.8%	0.8%	-2.7%	8.9%	VND/USD	23,482.50	0.1%	-0.6%

MSCI Emerging Markets

MSCI Frontier	495.93	-0.1%	-0.1%	0.5%	5.0%	Brent Crude (\$)	80.99	1.3%	-5.7%
MSCI Frontier 100	1,141.37	-0.1%	-0.07%	0.3%	4.7%	Gold (\$)	1,879.50	0.2%	2.9%
MSCI Emerging	1,014.49	-2.3%	-2.3%	-1.6%	6.1%	Copper (\$)	8,871.50	-1.2%	6.0%
MSCI World (USD)	2,793.59	-1.0%	-1.0%	0.3%	7.3%	Coffee (\$)	169.47	-1.8%	8.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.35	3.1%	19.5%	18.79	Sterling	1.60	-1.8%	14.3%	3.73
Axamansard	2.00	2.0%	0.0%	14.97	Fidelity	5.92	-1.3%	36.1%	21.09
FCMB	4.99	1.8%	29.6%	23.98	UBA	8.40	-0.6%	10.5%	125.39
MTNN	242.00	1.7%	12.6%	220.98	Guaranty	25.10	-0.4%	9.1%	1270.53
United Capital PLC	14.95	1.0%	6.8%	86.67	Zenith	25.10	-0.4%	4.6%	452.44
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	4.99	4.99	0.0%	23.98	Nascon	10.90	9.00	21.1%	3.99
Wema	4.07	4.07	0.0%	0.46	Unilever	13.55	10.50	29.0%	1.23
Total	224.00	224.00	0.0%	25.64	Custodian	6.00	4.55	31.9%	0.09
Seplat Petroleum	1325.00	1325.00	0.0%	722.25	Cap	20.30	15.25	33.1%	0.28
P Z Cussons	10.25	10.25	0.0%	1.27	Guaranty	25.10	18.00	39.4%	1270.53

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.	2.48	6.9%	54.0%	0.10	Union Insurance Co.	0.57	-9.8%	-9.8%	0.00
National Marine Dredging Co.	34.92	5.8%	42.6%	41.98	Gulf Medical Projects Company	1.98	-9.6%	-8.3%	0.00
Sudatel Telecommunications Group Company Limited	0.49	4.0%	6.5%	1.28	RAK Co. for White Cement & Const Materials	1.45	-4.6%	-19.0%	0.07
National Corp for Tourism & Hotels	2.78	3.7%	-7.3%	0.00	Gulf Cement Co.	0.46	-4.6%	-11.5%	0.01
Al Dar Properties	4.55	2.7%	2.7%	72.09	PALMS SPORTS	9.00	-2.9%	-8.2%	8.79
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	The National Investor	0.45	0.45	0.0%	0.00
Al Fujairah National Insurance Co.	210.00	210.00	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sharjah Insurance Co.	1.50	1.50	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Insurance Co.	6.12	6.12	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£)
Telecom Egypt	27.25	6.2%	8.6%	57.94	Abou Kir Fertilizers	40.00	-1.9%	3.1%	62.64
E-finance For Digital and Financial Investments	18.00	5.9%	-5.3%	52.86	Credit Agricole Egypt	9.75	-1.1%	15.2%	13.35
Sidi Kerir Petrochemicals	15.70	5.4%	19.7%	60.86	Egyptian Financial Group	18.10	-1.0%	1.2%	38.10
Juhayna Food Industries	10.77	4.4%	10.0%	14.90	T M G Holding	9.75	-0.9%	-2.4%	16.65
Cleopatra Hospital Company	5.50	4.0%	3.4%	5.97	Misr Fertilizers Production Company	146.10	-0.5%	3.5%	7.53
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	27.25	27.25	0.0%	57.94	Housing & Development Bank	9.45	9.45	0.0%	93.87
Sidi Kerir Petrochemicals	15.70	15.70	0.0%	60.86	Sidi Kerir Petrochemicals	15.70	6.33	0.0%	60.86
Palm Hills Development Co.	2.27	2.27	0.0%	73.16	T M G Holding	9.75	6.50	0.0%	16.65
Oriental Weavers	10.43	10.43	0.0%	24.67	Taaleem Management Services	4.02	2.72	0.0%	0.09
Orascom Construction PLC	99.29	99.29	0.0%	7.53	Telecom Egypt	27.25	12.77	0.0%	57.94

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	541.90	8.6%	-33.8%	19979.545	Divi's Laboratories Ltd	2781.00	-3.6%	-18.5%	6107.97
Indusind Bank	1131.00	2.5%	-7.3%	3227.65	Jsw Steel	709.70	-3.0%	-7.6%	861.13
Bharat Petroleum	333.85	2.2%	1.0%	1093.89	Hindalco Industries	446.75	-2.8%	-5.6%	1980.45
Apollo Hospitals Enterprise Ltd	4325.00	1.7%	-3.4%	1099.59	Tata Steel	117.20	-2.6%	4.0%	5838.54
Hero Motocorp	2699.00	1.7%	-1.5%	678.57	Infosys	1565.00	-2.2%	3.8%	7179.11
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.	4628.00	4659.75	-0.7%	1456.12	Divi's Laboratories Ltd	2781.00	2745.00	1.3%	6107.97
ITC	383.50	388.20	-1.2%	9918.38	HDFC Life Insurance Company Ltd	482.95	473.70	2.0%	3578.36
Mahindra & Mahindra	1374.15	1391.95	-1.3%	2064.43	Reliance Industries	2312.90	2180.00	6.1%	15831.29
HUL	2640.00	2741.60	-3.7%	4439.96	Tech Mahindra	1004.00	943.70	6.4%	2012.26
Sun Pharma Industries	1023.00	1072.15	-4.6%	1238.69	Kotak Mahindra Bank	1747.85	1631.00	7.2%	5317.36

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	38.10	7.3%	-3.2%	5.45	Equity Group Holdings Plc	46.00	-7.8%	3.4%	83.12
Nairobi Securities Exchange Plc	6.90	3.0%	1.8%	0.09	Nation Media Group	14.65	-2.3%	-8.2%	0.14
Kenya Power & Lighting Limited	1.56	2.6%	0.0%	0.26	Total Kenya Ltd	23.05	-2.1%	-3.4%	0.24
Centum Investment Company	8.90	1.8%	6.5%	11.58	Bamburi Cement Ltd	28.60	-1.7%	-9.2%	0.43
Kengen Limited	2.89	1.8%	-10.2%	0.40	Absa Bank Kenya	12.30	-0.8%	0.0%	1.31
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	157.25	159.00	-1.1%	0.08	Bamburi Cement Ltd	28.60	28.60	0.0%	0.43
Stanbic Holdings	110.75	114.00	-2.9%	0.11	Kenya Reinsurance Corporation Ltd	1.76	1.76	0.0%	0.60
NCBA Group	38.10	40.00	-4.8%	5.45	Nation Media Group	14.65	14.65	0.0%	0.14
Absa Bank Kenya	12.30	12.95	-5.0%	1.31	Kengen Limited	2.89	2.84	1.8%	0.40
East African Breweries Limited	177.25	194.00	-8.6%	2.25	WPP Scangroup	2.98	2.80	6.4%	1000.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Re for Cooperative Reinsurance Co.	16.98	5.7%	23.9%	31.72	Salama Cooperative Insurance Co.	16.16	-3.8%	24.7%	20.30
Basic Chemical Industries Co.	35.85	5.4%	6.4%	3.80	Ethad Atheeb Telecom Co.	67.30	-3.7%	43.3%	43.21
Riyadh Cables Group Co.	42.35	5.4%	14.0%	22.67	Riyad Bank	28.25	-3.3%	-11.2%	63.37
Saudi Industrial Investment Group	23.26	4.4%	5.8%	26.54	Alinma Bank	29.45	-3.1%	-9.5%	426.43
Elm Co.	368.60	4.3%	11.0%	85.88	The Mediterranean and Gulf Insurance and Reinsurance Co.	9.47	-3.0%	9.9%	8.90
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.	185.00	185.00	0.0%	9.83	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Elm Co.	368.60	368.60	0.0%	85.88	Allied Cooperative Insurance Group	12.30	12.30	0.0%	1.63
Saudi Tadawul Group Holding Co.	162.60	162.60	0.0%	38.63	Arabian Centres Co.	0.00	0.00	0.0%	0.00
ACWA POWER Co.	148.20	148.20	0.0%	18.41	Aseer Trading, Tourism and Manufacturing Co.	0.00	0.00	0.0%	0.00
Arabian Internet and Communications Services Co.	248.00	248.00	0.0%	165.54	Dar Alarkan Real Estate Development Co.	0.00	0.00	0.0%	0.00

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mondi	33792.00	1.6%	16.1%	7145.32	Prosus NV	136748.00	-2.3%	16.1%	35502.52
Aspen Pharmacare Holdings Ltd	15116.00	1.1%	10.9%	4994.18	Investec Ltd	10980.00	-2.2%	2.1%	4745.23
MTN Group LTD	14541.00	1.0%	14.2%	30826.92	AngloGold Ashanti Ltd	35372.00	-2.2%	7.4%	22009.52
Discovery Ltd	14311.00	0.7%	16.0%	6302.71	Investec	11060.00	-2.1%	2.7%	10396.40
British American Tobacco	66108.00	0.6%	-1.9%	32379.04	Naspers Ltd	333045.00	-2.1%	17.9%	72274.10
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)
Cie Financiere Richemont SA	26674.00	26880.00	-0.8%	48813.42	Clicks Group Ltd	27375.00	25757.00	6.3%	5439.96
Bidvest Group Ltd	23841.00	24189.00	-1.4%	12292.18	Vodacom Group Ltd	12395.00	11562.00	7.2%	5619.77
Woolworths Holdings Ltd/South Africa	7636.00	7847.00	-2.7%	7559.64	Mr Price Group Ltd	16431.00	15199.00	8.1%	3343.38
Investec Ltd	10980.00	11296.00	-2.8%	4745.23	MultiChoice Group	12201.00	10925.00	11.7%	2616.02
Investec PLC	11060.00	11382.00	-2.8%	10396.40	British American Tobacco	66108.00	58585.00	12.8%	32379.04

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	38800.00	4.0%	22.4%	55,048,55	Viet Nam International Commercial Joint Stock Bank	23650.00	-2.7%	24.5%	76,685,32
BaoViet Holdings	45000.00	3.8%	-3.4%	76,834,40	Mobile World Inv. Corp	47150.00	-1.4%	9.9%	123,333,72
PetroVietnam Power Corp	12550.00	3.3%	17.8%	112,493,84	Sai Gon Thuong Tin Commercial	25700.00	-1.3%	14.2%	503,823,68
Vietcombank	96000.00	3.2%	20.0%	109,156,01	Vinhomes	47950.00	-0.3%	-0.1%	80,337,48
Techcombank	27950.00	3.1%	8.1%	87,765,41	Hoa Phat Group	18500.00	-0.3%	2.8%	31,232,64
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)
Vietcombank	96000.00	96000.00	0.0%	109,156,01	BaoViet Holdings	45000.00	45000.00	0.0%	76,834,40
Vietnam Rubber Group	106000.00	106000.00	0.0%	25,575,83	FPT Corp	29900.00	29900.00	0.0%	76,720,78
Vietnam JSC Bank	50600.00	50600.00	0.0%	29,892,46	Petrovietnam Gas	80500.00	80500.00	0.0%	76,171,93
Bank for Inv. and Devp	84000.00	84000.00	0.0%	5,842,00	Ho Chi Minh City Devp	15600.00	15600.00	0.0%	18,540,82
Saigon Beer Alcohol Beverage Corp.	195400.00	197900.00	-1.3%	15,222,86	Khang Dien House Trading & Investment	21150.00	21150.00	0.0%	463,767,76

Email: research@fsdhgroup.com • www.fsdhgroup.com

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