

Daily Market Report

9 February 2023

JSE

JSE All-Share Index increased by 0.55% and closed at 79,975.59 points on Wednesday, as the Energy and Industrial sectors recorded gains.

BRVM

BRVM composite Index was marginally up by 0.05% and closed at 201.23 points on Wednesday, with CFAO Motors Côte d'Ivoire and Safca Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index increased by 0.23% to close at 54,427.05 points on Wednesday, as the Industrial, Insurance, and Banking sectors recorded gains.

EGX

EGX 30 Index increased by 0.28% and closed at 16,948.08 points on Wednesday, the market gained LE 800 million of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index climbed by 1.94% to close at 814.42 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.55%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.05%
NGX Nigerian Stock Exchange	▲	0.23%
EGX Egyptian Stock Exchange	▲	0.28%
ESG Casablanca Stock Exchange	▲	1.94%

African Markets

Nigeria: NGX 30 Index increased by 0.21% to close at 1,956.23 points on Wednesday. Dangote Cement and Fidelity were the top gainers.

Egypt: EGX 30 Index increased by 0.28% and closed at 16,948.08 points on Wednesday, the market gained LE 800 million of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.42% and closed at 1,678.64 points on Wednesday. Nation Media Group and Centum Investment Company were the top gainers.

South Africa: JSE Top 40 Index increased by 0.73% and closed at 73,968.06 points on Wednesday, as the Energy and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.34%
Exchange Rate	₦ 460.97
INTERBANK RATES	
OPR	10.50 ↔
Overnight	10.81 ↔

Other Emerging Markets

Abu Dhabi: ADX Index inched up by 0.04% to close at 10,007.57 points on Wednesday, as gains in the Financials, Energy, and Real Estate sectors led shares higher. MSCI UAE inched up by 0.05% to close at 412.21 points.

Vietnam: VN-30 Index increased by 0.36% to close at 1,073.38 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.60% to close at 646.82 points.

Saudi Arabia: Tadawul All Share Index increased by 0.37% to close at 10,507.72 points on Wednesday, as gains in the Consumer Durables & Apparel, Transportation, and Retailing sectors led shares higher. MSCI Saudi Arabia increased by 0.21% to close at 1,439.54 points.

India: Nifty 50 Index increased by 0.85% to close at 17,871.70 points on Wednesday, as gains in the Pharma, IT and Metal sectors led shares higher. MSCI India jumped by 1.00% to close at 1,987.97 points.

News

Nigeria:

MTN raises dividend by N76bn
GE to partner Nigeria on energy growth
Discos remittances drop by N70bn in three months

Kenya:

Eurobond yields fall 51pc
Kenya's mobile money agent transactions hit Sh7.9 trillion
Kenya Power Plans to Electrify 2,000 of its Vehicles

Abu Dhabi:

Industrial sector contributes \$49bn to UAE GDP
Dana Gas pipes in Dh667m profit on high energy prices
Abu Dhabi National Hotels confirms Dh400m dividend for 2022

Saudi Arabia:

SNB Capital announces completion of \$267m AT-1 sukuk
Assets allocated to APICORP's debut green bond reach \$335m
Aramco to build Zoom's first global data centre in Saudi

Egypt:

Moody's downgrades Egypt's ratings to B3, changes outlook to stable
Egyptian exports jumped 19.2% in first 11 months of 2022, to \$46.9bn
32 Egyptian state companies to be floated on EGX over a year: PM

South Africa:

Economic activity positive for 2nd month but load-shedding poses risk
Steinhoff to raise capital from sale of some of its Pepkor shares
Anglo says payouts to decline as SA power outages hit

India:

RBI projects inflation to fall to 5.3% in FY24
RBI to issue norms to boost green finance, mitigate climate risks
TCS scores \$700 million deal to digitize UK insurer's products

Vietnam:

Nearly 33 trillion VND worth of G-bonds raised in Jan
SeABank gets additional IFC funding for housing loans
Vietnamese aviation market predicted to fully recover by year-end

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,007.57	0.04%	0.8%	2.0%	-2.0%	AED/USD	3.67	0.0%	0.0%
Egypt	16,948.08	0.3%	4.3%	3.1%	16.1%	EGP/USD	30.37	0.2%	22.9%
India	17,871.70	0.8%	0.1%	1.2%	-1.3%	INR/USD	82.66	-0.1%	-0.1%
Kenya	1,678.64	0.4%	0.9%	1.3%	0.2%	KES/USD	125.10	0.1%	1.3%
Nigeria	1,956.23	0.2%	0.5%	2.3%	6.2%	NGN/USD	460.42	0.0%	2.8%
Saudi Arabia	10,507.72	0.4%	-1.8%	-2.6%	0.3%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,968.07	0.7%	-0.2%	0.7%	10.5%	ZAR/USD	17.75	1.3%	4.3%
Vietnam	1,073.38	0.4%	-1.1%	-4.6%	6.8%	VND/USD	23,595.00	-0.1%	-0.2%

MSCI Emerging Markets

MSCI Frontier	494.16	0.3%	-0.5%	0.1%	4.6%	Brent Crude (\$)	85.09	1.7%	-1.0%
MSCI Frontier 100	1,138.05	0.4%	-0.4%	0.005%	4.3%	Gold (\$)	1,890.70	0.3%	3.5%
MSCI Emerging	1,020.58	0.5%	-1.7%	-1.1%	6.7%	Copper (\$)	8,892.50	-0.4%	6.2%
MSCI World (USD)	2,801.96	-0.7%	-0.7%	0.6%	7.7%	Coffee (\$)	172.14	0.5%	10.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	2.05	2.5%	2.5%	2.48	Transnational Corp	1.26	-7.4%	11.5%	24.62
Dangote Cement	270.00	1.9%	3.4%	54.54	Unilever	13.05	-4.0%	12.5%	8.85
Fidelity	5.90	1.7%	35.6%	10.46	P Z Cussons	10.00	-2.4%	-11.9%	2.72
Zenith	25.20	0.8%	5.0%	152.96	FBNH	11.80	-0.8%	8.3%	77.94
UBN	6.65	0.8%	3.9%	11.42	UBA	8.35	-0.6%	9.9%	64.69
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	4.60	4.60	0.0%	12.43	Unilever	13.05	10.50	24.3%	8.85
Wema	4.06	4.06	0.0%	1.60	Nascon	11.20	9.00	24.4%	0.67
Total	224.00	224.00	0.0%	60.93	Custodian	6.00	4.55	31.9%	0.56
Seplat Petroleum	1325.00	1325.00	0.0%	0.52	Cap	20.20	15.25	32.5%	0.77
P Z Cussons	10.00	10.00	0.0%	2.72	Sterling	1.53	1.13	35.4%	23.90

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	9.7%	54.0%	0.11	Aram Group	1.54	-9.9%	-30.9%	0.03
Gulf Cement Co.	0.50	8.5%	-4.0%	0.01	Fujairah Cement Industries	0.34	-9.7%	-28.8%	0.00
National Corp for Tourism & Hotels	2.90	4.3%	-3.3%	0.27	Abu Dhabi National Takaful Co.	5.12	-6.9%	-20.5%	0.01
Al Dar Properties	4.78	3.0%	7.9%	119.03	The National Bank of Ras Al Khaimah	4.70	-5.4%	0.0%	0.05
Easy Lease Motorcycle Rental PJSC	32.48	1.5%	-6.7%	12.60	Sharjah Cement and Industrial Development Co.	0.57	-4.5%	-6.8%	0.00
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	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Al Fujairah National Insurance Co.	210.00	210.00	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Invest Bank	0.45	0.45	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£)
Misr Fertilizers Production Co.	151.35	3.0%	6.3%	19.97	Abu Dhabi Islamic Bank- Egypt	21.60	-5.2%	20.2%	32.69
Abou Kir Fertilizers	41.10	2.1%	6.0%	79.06	Juhayna Food Industries	10.33	-5.1%	5.5%	11.96
Commercial International Bank	55.55	1.9%	33.9%	304.66	QALA For Financial Investments	1.96	-3.9%	-5.8%	105.54
Egyptian Kuwaiti Holding	34.50	1.8%	9.5%	31.21	Palm Hills Development Co.	2.15	-3.6%	9.7%	46.71
ELSWEDY ELECTRIC	12.41	1.7%	3.4%	57.49	Housing & Development Bank	9.23	-2.3%	-21.3%	11.43
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	27.33	27.33	0.0%	13.70	Housing & Development Bank	9.23	9.23	0.0%	37.21
Sidi Kerir Petrochemicals	16.19	16.19	0.0%	58.59	T M G Holding	9.73	6.50	0.0%	28.61
Palm Hills Development Co.	2.15	2.15	0.0%	46.71	Taaleem Management Services	4.21	2.72	0.0%	0.49
Oriental Weavers	11.23	11.23	0.0%	48.93	Telecom Egypt	27.33	12.77	0.0%	13.70
Orascom Construction	98.07	98.07	0.0%	2.96	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.62	1.62	0.0%	0.80

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	2220.00	23.1%	-42.5%	38791.401	Larsen & Toubro	2133.25	-1.5%	2.3%	3113.49
Adani Ports And Sez.	603.00	9.0%	-26.3%	18391.17	Eicher Motors	3228.00	-1.4%	0.0%	1220.83
HDFC Life Insurance Co. Ltd	508.30	5.3%	-10.2%	5277.40	Bharti Airtel	775.00	-1.4%	-3.9%	7701.98
SBI Life Insurance	1164.20	2.9%	-5.4%	3785.85	Hero Motocorp	2616.35	-1.4%	-4.5%	2072.61
Bajaj Finance	6335.20	2.8%	-3.7%	11966.00	Axis Bank	871.80	-0.8%	-6.6%	5747.34
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Mahindra & Mahindra	1373.60	1391.95	-1.3%	1701.81	Divi's Laboratories Ltd	2804.00	2740.10	2.3%	2556.90
Britannia Inds.	4599.00	4664.00	-1.4%	1164.12	Tech Mahindra	1010.50	943.70	7.1%	2646.27
Dr Reddys Lab	4484.00	4645.00	-3.5%	1071.75	HDFC Life Insurance Company Ltd	508.30	473.70	7.3%	5277.40
ITC	374.55	388.20	-3.5%	3908.92	Reliance Industries	2349.65	2180.00	7.8%	22899.78
Hdfc Bank	1652.00	1722.10	-4.1%	7001.86	Kotak Mahindra Bank	1763.10	1631.00	8.1%	2559.47

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	14.95	2.7%	-6.3%	0.04	NCBA Group	37.55	-1.4%	-4.6%	0.56
Centum Investment Company	9.00	2.7%	7.7%	3.94	Total Kenya Ltd	22.55	-0.7%	-5.5%	0.09
Bamburi Cement Limited	28.95	1.0%	-8.1%	0.05	Kenya Power & Lighting Limited	1.57	-0.6%	0.6%	0.44
East African Breweries Limited	179.75	0.8%	7.3%	27.14	Nairobi Securities Exchange	6.78	-0.6%	0.0%	0.02
Absa Bank Kenya	12.55	0.8%	2.0%	0.86	Kengen Limited	2.88	-0.3%	-10.6%	0.20
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%	18.60	Kenya Reinsurance Corporation Ltd	1.75	1.75	0.0%	0.30
Stanbic Holdings	111.00	114.00	-2.6%	11.43	Bamburi Cement Ltd	28.95	28.60	1.2%	0.05
Absa Bank Kenya	12.55	12.95	-3.1%	0.86	Kengen Limited	2.88	2.84	1.4%	0.20
NCBA Group Plc	37.55	40.00	-6.1%	0.56	Nation Media Group	14.95	14.55	2.7%	0.04
East African Breweries Limited	179.75	194.00	-7.3%	27.14	Nairobi Securities Exchange	6.78	6.38	6.3%	0.02

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Public Transport Co.	17.54	6.6%	10.0%	36.00	Banque Saudi Fransi	37.05	-4.6%	-8.7%	18.70
Bupa Arabia for Cooperative Insurance Co.	157.80	3.8%	9.7%	17.16	Saudi British Bank	32.45	-3.3%	-16.7%	60.80
Alkhaleej Training and Education Co.	15.92	3.5%	15.7%	5.84	Al Alamiya for Coop Insurance Co.	13.62	-2.9%	19.5%	0.79
Savola Group	29.20	3.2%	6.4%	7.21	Riyad Bank	26.70	-2.6%	-16.0%	64.86
Sahara International Petrochemical Co.	36.75	3.1%	8.2%	54.06	Amana Cooperative Insurance Co.	10.38	-2.4%	13.7%	8.16
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)
Alamar Foods Co.	148.80	148.80	0.0%	10.30	Al Alamiya for Coop Insurance Co.	13.62	13.62	0.0%	0.79
Nahdi Medical Co.	185.00	185.00	0.0%	6.65	Alkhabeer REIT Fund	7.00	7.00	0.0%	2.39
Elm Co.	375.60	375.60	0.0%	83.08	Allied Cooperative Insurance Group	12.10	12.10	0.0%	2.96
Saudi Tadawul Group Holding Co.	160.60	160.60	0.0%	43.09	Anaam International Holding Group	21.40	21.40	0.0%	6.22
ACWA POWER Co.	148.60	148.60	0.0%	8.53	AXA Cooperative Insurance 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)
Sasol Ltd	29390.00	3.5%	9.1%	35561.90	Anglo American Platinum Ltd	129142.00	-3.5%	-9.4%	40170.91
Cie Financiere Richemont SA	27008.00	1.6%	21.0%	40512.00	Absa Group Ltd	20039.00	-1.3%	3.3%	18435.88
Investec	11226.00	1.2%	4.3%	2249.02	Mr Price Group Ltd	15994.00	-1.1%	0.6%	4502.47
Old Mutual Ltd	1178.00	1.1%	12.6%	4818.02	NEPI Rockcastle NV	10950.00	-0.9%	6.2%	3287.52
Investec Ltd	11152.00	1.1%	3.7%	1234.97	Northam Platinum Holdings Ltd	17299.00	-0.8%	-7.6%	8864.70
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	27008.00	27008.00	0.0%	40512.00	Clicks Group Ltd	27007.00	25757.00	4.9%	9078.67
Investec Ltd	11152.00	11296.00	-1.3%	1234.97	Vodacom Group Ltd	12361.00	11562.00	6.9%	5756.64
Investec	11226.00	11382.00	-1.4%	2249.02	Mr Price Group Ltd	15994.00	15199.00	5.2%	4502.47
Bidvest Group Ltd	23601.00	24189.00	-2.4%	4347.54	MultiChoice Group	12486.00	10925.00	14.3%	2549.52
Woolworths Holdings Ltd	7494.00	7847.00	-4.5%	8018.58	British American Tobacco	65849.00	58585.00	12.4%	29120.40

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Khang Dien House Trading & Investment	20850.00	5.6%	-21.3%	688.126,41	Vietnam National Petroleum Group	37200.00	-4.6%	17.4%	28.029,76
Saigon Beer Alcohol Beverage Corp.	197200.00	3.1%	18.2%	21.607,31	Phat Dat Real Estate Development Corp	12350.00	-3.5%	-9.2%	101.033,61
FPT Corp	29900.00	2.4%	-61.1%	93.868,62	Sai Gon Thuong Tin Commercial	25000.00	-2.9%	11.1%	719.818,09
Vietcombank	94200.00	2.4%	17.8%	84.206,85	Mobile World Inv. Corp	44500.00	-2.6%	3.7%	74.312,28
Saigon Securities Inc	19500.00	2.4%	10.2%	240.498,76	No Va Land Invest	14300.00	-2.1%	2.1%	197.423,79
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)
Vietnam Rubber Group	107300.00	107300.00	0.0%	29.353,11	BaoViet Holdings	44500.00	44500.00	0.0%	80.331,69
Vietnam JSC Bank	49250.00	49250.00	0.0%	23.825,25	FPT Corp	29900.00	29900.00	0.0%	93.868,62
Bank for Inv. and Devp	84500.00	84500.00	0.0%	6.789,91	Petrovietnam Gas	81200.00	81200.00	0.0%	54.403,69
Saigon Beer Alcohol Beverage Corp.	197200.00	197900.00	-0.4%	21.607,31	Ho Chi Minh City Devp	14750.00	14750.00	0.0%	23.706,04
Vietcombank	94200.00	96000.00	-1.9%	84.206,85	Khang Dien House Trading & Investment	20850.00	20850.00	0.0%	688.126,41

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