

Daily Market Report

16 February 2023

JSE

JSE All-Share Index decreased by 0.48% and closed at 79,471.76 points on Wednesday, as the Financial and Resources sectors recorded losses.

BRVM

BRVM composite Index increased by 0.20% and closed at 204.59 points on Wednesday, with Setao Côte d'Ivoire and Total Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was marginally up by 0.02% to close at 54,507.66 points on Wednesday, as the Insurance and Industrial sectors recorded gains.

EGX

EGX 30 Index increased by 0.53% and closed at 17,522.56 points on Wednesday, the market gained LE 10 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.61% to close at 804.39 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.48%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.20%
NGX Nigerian Stock Exchange	▲	0.02%
EGX Egyptian Stock Exchange	▲	0.53%
ESG Casablanca Stock Exchange	▲	0.61%

African Markets

Nigeria: NGX 30 Index inched up by 0.02% to close at 1,958.66 points on Wednesday. Lafarge Africa and FBNH were the top gainers.

Egypt: EGX 30 Index increased by 0.53% and closed at 17,522.56 points on Wednesday, the market gained LE 10 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.32% and closed at 1,677.22 points on Wednesday. Nairobi Securities Exchange and Kenya Power & Lighting Limited were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.49% and closed at 73,463.00 points on Wednesday, as the Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 461.05
INTERBANK RATES	
OPR	16.13 ▲
Overnight	16.63 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.30% to close at 9,990.1 points on Wednesday, as losses in the Health Care, Real Estate, and Financials sectors pushed shares lower. MSCI UAE decreased by 0.32% to close at 412.76 points.

Vietnam: VN-30 Index increased by 0.81% to close at 1,043.34 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.44% to close at 629.76 points.

Saudi Arabia: Tadawul All Share Index increased by 0.73% to close at 10,573.05 points on Wednesday, as gains in the Banks, Transportation, and Retailing sectors led shares higher. MSCI Saudi Arabia increased by 0.81% to close at 1,446.26 points.

India: Nifty 50 Index increased by 0.48% to close at 18,015.85 points on Wednesday, as gains in the Bank, IT and Metal sectors led shares higher. MSCI India increased by 0.59% to close at 1,989.46 points.

News

Nigeria:

Private sector blames fuel scarcity as inflation hits 21.8%
Raddison, firm sign deal to boost African expansion
Group launches podcasts on economic growth

Kenya:

KRA misses tax targets by Sh27bn in Ruto presidency
Treasury plan to deal with Kenya's debt crisis by 2026
Central Bank seeks Sh50bn in March treasury bond auction

Abu Dhabi:

Abu Dhabi economy grows fastest in MENA, GDP at 10.5%
Abu Dhabi's Hub71 launches \$2bn blockchain start-up fund
Dubai records over \$462.8mln in realty transactions Wednesday

Saudi Arabia:

Saudi inflation ticks up to 3.4% in January
Saudi Arabia and UK sign agreement to modernize aviation safety
Saudi Ports Authority and Maersk to develop \$346m logistics park at Jeddah port

Egypt:

Egypt's external debt inches down to \$155 bln in 1Q FY2022/2023: CBE
Egypt signs 16 MoU during EGYP23's final day
Egypt to launch 1st-ever bid for obsolete energy fields

South Africa:

Food prices hit 14-year high as load shedding escalates
South Africans fleeing slack municipalities, heading to WC
Ramaphosa's investment czar says SA infrastructure in dire state

India:

India's exports in January dipped by 6.58%
Adani Group looks to repay \$500 million bridge loan taken for cement deals
Indigo promoters to sell 4% for Rs 2,900 crore

Vietnam:

HSBC called to join green transformation, green projects in Vietnam
Vietnam needs to build national brands for fruits
Nearly 200 businesses to join Autotech & Accessories show 2023

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,990.10	-0.3%	-0.3%	1.8%	-2.2%	AED/USD	3.67	0.0%	0.0%
Egypt	17,522.56	0.5%	-0.5%	6.5%	20.0%	EGP/USD	30.54	-0.2%	23.6%
India	18,015.85	0.5%	0.9%	2.0%	-0.5%	INR/USD	82.78	-0.1%	0.0%
Kenya	1,677.22	0.3%	0.3%	1.2%	0.1%	KES/USD	125.50	0.0%	1.6%
Nigeria	1,958.66	0.02%	0.3%	2.4%	6.3%	NGN/USD	460.56	0.0%	2.8%
Saudi Arabia	10,573.05	0.7%	1.5%	-2.0%	0.9%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,463.00	-0.5%	0.6%	0.04%	9.7%	ZAR/USD	18.03	0.8%	5.9%
Vietnam	1,043.34	0.8%	-0.5%	-7.3%	3.8%	VND/USD	23,625.00	0.1%	0.0%

MSCI Emerging Markets

MSCI Frontier	489.82	0.1%	-0.7%	-0.8%	3.7%	Brent Crude (\$)	85.38	-0.2%	-0.6%
MSCI Frontier 100	1,125.32	0.3%	-0.7%	-1.1%	3.2%	Gold (\$)	1,845.30	-1.1%	1.0%
MSCI Emerging	1,004.87	-0.9%	-0.9%	-2.6%	5.1%	Copper (\$)	8,853.50	-1.0%	5.8%
MSCI World (USD)	2,815.45	0.1%	1.1%	1.1%	8.2%	Coffee (\$)	170.64	0.0%	9.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	26.65	1.3%	11.0%	65.41	Nascon	10.80	-3.6%	-2.7%	6.67
FBNH	11.70	0.9%	7.3%	73.98	FCMB	4.45	-3.3%	15.6%	9.83
Transnational Corporation	1.26	0.8%	11.5%	1.22	Fidelity	5.20	-3.0%	19.5%	14.87
UBA	8.40	0.6%	10.5%	109.90	UACN	9.10	-1.1%	-11.2%	4.02
Guaranty	25.15	0.2%	9.3%	1064.62	Custodian	6.00	-0.8%	0.8%	7.52
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	4.45	4.45	0.0%	9.83	Nascon	10.80	9.00	20.0%	6.67
Wema	4.09	4.09	0.0%	0.36	Unilever	13.25	10.50	26.2%	3.01
Total	218.80	218.80	0.0%	2.58	Custodian	6.00	4.55	31.9%	7.52
Seplat Petroleum	1325.00	1325.00	0.0%	1182.99	Cap	20.20	15.25	32.5%	12.37
P Z Cussons	10.00	10.00	0.0%	1.96	Sterling	1.51	1.13	33.6%	5.98

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.40	14.8%	-18.2%	0.00	Gulf Cement Co.	0.45	-8.3%	-12.9%	0.02
Hayah Insurance Company	0.94	2.4%	-2.7%	0.05	Fertiglobe	4.00	-3.4%	-5.4%	100.27
Ras Al Khaimah Poultry & Feeding Co.	2.49	2.1%	54.7%	0.09	Al Seer Marine Supplies & Equipment Co.	7.78	-3.1%	-17.4%	9.02
GHITHA HOLDING	71.30	1.7%	-2.3%	30.62	Gulf Pharmaceutical Industries	1.08	-2.7%	-6.9%	0.07
Sharjah Cement and Industrial Development Co.	0.62	1.6%	0.8%	0.00	DANA GAS PJSC	0.81	-2.6%	-11.6%	21.20
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 Company	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£)
Credit Agricole Egypt	10.98	6.4%	29.8%	52.95	T M G Holding	10.06	-2.1%	0.7%	67.52
Sidi Kerir Petrochemicals	19.75	6.2%	50.5%	104.06	Misr Fertilizers Production Company	152.65	-2.1%	7.2%	3.51
Juhayna Food Industries	11.76	5.1%	20.1%	24.03	Taaleem Management Services	4.21	-1.4%	5.3%	0.80
E-finance For Digital and Financial Investments	18.69	3.6%	-1.7%	144.54	ELSWEDY ELECTRIC	13.50	-1.2%	12.5%	45.06
Egyptian Financial Group	20.64	3.2%	15.4%	182.67	Medinet Nasr Housing	3.61	-0.8%	7.2%	3.51
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	26.77	26.77	0.0%	12.68	Housing & Development Bank	10.60	10.60	0.0%	170.64
T M G Holding	10.06	10.06	0.0%	67.52	T M G Holding	10.06	6.50	0.0%	67.52
Sidi Kerir Petrochemicals	19.75	19.75	0.0%	104.06	Taaleem Management Services	4.21	2.72	0.0%	0.80
Palm Hills Development Co.	2.18	2.18	0.0%	48.42	Telecom Egypt	26.77	12.77	0.0%	12.68
Oriental Weavers	11.55	11.55	0.0%	84.74	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.64	1.62	0.0%	14.89

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1068.60	5.6%	5.1%	7078.705	HUL	2548.00	-1.2%	-0.5%	5117.59
Apollo Hospitals Enterprise Ltd	4482.00	5.0%	0.1%	11966.40	Sun Pharma Industries	995.00	-1.2%	-0.6%	2244.15
Eicher Motors	3316.00	4.4%	2.7%	6894.25	ONGC	147.30	-0.8%	0.4%	1857.68
Reliance Industries	2435.05	2.4%	-4.4%	37379.92	Larsen & Toubro	2176.10	-0.7%	4.3%	4227.05
Bajaj Finserv	1422.00	1.7%	-8.1%	2140.39	Indusind Bank	1149.25	-0.7%	-5.8%	2356.82
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	1378.00	1391.95	-1.0%	2753.30	Divi's Laboratories Ltd	2824.00	2740.10	3.1%	600.79
ITC	382.10	388.20	-1.6%	4646.51	Wipro	407.00	372.40	9.3%	1058.34
Britannia Inds.	4590.00	4669.20	-1.7%	902.39	Asian Paints	2798.30	2560.00	9.3%	2271.64
Dr Reddys Lab	4516.30	4645.00	-2.8%	1161.05	HDFC Life Insurance Company Ltd	518.10	473.70	9.4%	1289.49
Ultratech Cement	7153.05	7389.00	-3.2%	2877.73	Kotak Mahindra Bank	1785.75	1631.00	9.5%	4283.62

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	6.88	6.8%	1.5%	0.06	Bamburi Cement Ltd	27.35	-5.2%	-13.2%	0.27
Kenya Power & Lighting Limited	1.61	2.5%	3.2%	0.19	Stanbic Holdings	111.00	-0.7%	8.8%	3.33
NCBA Group	37.55	0.8%	-4.6%	0.65	East African Breweries Limited	179.25	-0.6%	7.0%	7.12
Nation Media Group	15.10	0.7%	-5.3%	0.06	Total Kenya Ltd	22.70	-0.4%	-4.8%	0.22
Kenya Reinsurance Corporation Ltd	1.80	0.6%	-1.6%	0.03	Absa Bank Kenya	12.45	-0.4%	0.0%	0.00
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	159.25	159.25	0.0%	0.00	Bamburi Cement Ltd	27.35	27.35	0.0%	0.27
Stanbic Holdings	111.00	114.00	-2.6%	3.33	Absa Bank Kenya	12.45	9.02	0.0%	0.00
Absa Bank Kenya	12.45	12.95	-3.9%	0.00	Kengen Limited	2.77	2.76	0.4%	0.24
NCBA Group Plc	37.55	40.00	-6.1%	0.65	Kenya Reinsurance Corporation Ltd	1.80	1.75	2.9%	0.03
East African Breweries Limited	179.25	194.00	-7.6%	7.12	Nation Media Group	15.10	14.55	3.8%	0.06

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Dr. Sulaiman Al Habib Medical Services Group	244.00	5.2%	10.6%	99.78	Al Gassim Investment Holding Co.	26.15	-6.8%	39.1%	25.94
Al-Baha Investment and Development Co.	13.34	3.9%	16.0%	13.26	Thob Al Aseel Co.	37.20	-2.8%	-1.6%	4.69
Yamama Cement Co.	28.85	3.8%	6.9%	23.58	Alinma Tokio Marine Co.	14.68	-2.7%	22.3%	4.79
City Cement Co.	20.40	3.3%	2.0%	8.95	SABIC Agri-Nutrients Co.	125.40	-2.5%	-14.2%	211.79
Saudi Research and Marketing Group	192.00	3.2%	5.5%	10.66	Alljazira Mawten REIT Fund	16.50	-2.4%	-7.5%	4.28
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.	158.00	158.00	0.0%	22.01	Al Alamiya for Coop Insurance Co.	13.42	13.42	0.0%	1.49
Nahdi Medical Co.	188.80	188.80	0.0%	13.33	Alkabeer REIT Fund	7.01	7.01	0.0%	0.53
Elm Co.	395.00	395.00	0.0%	80.93	Allied Cooperative Insurance Group	11.70	11.70	0.0%	0.83
Saudi Tadawul Group Holding Co.	164.80	164.80	0.0%	51.34	Anaam International Holding Group	21.36	21.36	0.0%	12.44
ACWA POWER Co.	149.00	149.00	0.0%	14.29	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)
Clicks Group Ltd	27545.00	1.4%	2.0%	1677.22	Anglo American Platinum Ltd	119195.00	-3.0%	-16.3%	3472.15
MTN Group Ltd	14565.00	0.8%	14.4%	1420.67	Impala Platinum Holdings Ltd	18887.00	-2.1%	-11.4%	1987.48
Capitec Bank Holdings Ltd	179553.00	0.7%	-3.4%	1856.58	AngloGold Ashanti Ltd	34314.00	-2.0%	4.2%	1633.00
British American Tobacco	67950.00	0.6%	0.8%	2545.41	Sibanye Stillwater Ltd	4269.00	-2.0%	-4.5%	2930.63
Sasol Ltd	30068.00	0.4%	11.6%	2335.68	Anglo American	68872.00	-1.9%	3.8%	6133.74
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)
Bidvest Group Ltd	24162.00	24356.00	-0.8%	821.27	Vodacom Group Ltd	12279.00	11562.00	6.2%	406.80
Investec Ltd	11333.00	11516.00	-1.6%	300.44	Clicks Group Ltd	27545.00	25757.00	6.9%	1677.22
Woolworths Holdings Ltd	7774.00	7900.00	-1.6%	944.85	Mr Price Group Ltd	16489.00	15199.00	8.5%	275.70
Bid Corp Ltd	38659.00	39861.00	-3.0%	704.75	British American Tobacco PLC	67950.00	58585.00	16.0%	2545.41
NEPI Rockcastle NV	10858.00	11299.00	-3.9%	764.84	MultiChoice Group	12970.00	10925.00	18.7%	146.95

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Prosperity	17200.00	3.0%	-3.9%	215.656,00	No Va Land Invest	11150.00	-6.7%	-20.4%	580.518,40
Asia Commercial JS Bank	24550.00	2.9%	12.1%	81.035,98	Sai Gon Thuong Tin Commercial	23350.00	-4.3%	3.8%	789.193,11
Phat Dat Real Estate Development Corp	10900.00	2.8%	-19.9%	52.549,82	Vinhomes	42500.00	-0.6%	-11.5%	180.569,38
Ho Chi Minh City Devp	14500.00	2.5%	-9.1%	19.788,40	Vietjet Aviation	102700.00	-0.1%	-6.2%	18.867,67
Techcombank	27400.00	2.1%	6.0%	71.901,83					
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 JSC	107100.00	107100.00	0.0%	19.440,75	BaoViet Holdings	44000.00	44000.00	0.0%	26.635,28
Vietnam JSC Bank	49400.00	49400.00	0.0%	8.008,28	FPT Corp	28900.00	28900.00	0.0%	42.677,44
Bank for Inv. and Devp	84900.00	84900.00	0.0%	4.255,06	Petrovietnam Gas	81600.00	81600.00	0.0%	52.492,26
Vietcombank	93000.00	96000.00	-3.1%	83.672,29	Ho Chi Minh City Devp	14500.00	14500.00	0.0%	19.788,40
Saigon Beer Alcohol Beverage Corp.	189000.00	197900.00	-4.5%	14.592,07	Khang Dien House Trading & Investment	20800.00	20800.00	0.0%	417.722,20

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

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