

Daily Market Report

21 February 2023

JSE

JSE All-Share Index increased by 0.70% and closed at 79,829.39 points on Monday, as the Industrial and Materials sectors recorded gains.

BRVM

BRVM composite Index decreased by 0.37% and closed at 204.72 points on Monday, with Oragroup Togo and Crown Siem Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.78% to close at 54,224.35 points on Monday, as the Oil & Gas, Banking and Insurance sectors recorded gains.

EGX

EGX 30 Index fell by 2.96% and closed at 16,814.00 points on Monday, the market lost LE 25.57 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index marginally increased by 0.08% to close at 813.40 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.70%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.37%
NGX Nigerian Stock Exchange	▲	0.78%
EGX Egyptian Stock Exchange	▼	2.96%
ESG Casablanca Stock Exchange	▲	0.08%

African Markets

Nigeria: NGX 30 Index increased by 0.75% to close at 1,946.63 points on Monday. Fidelity and International Breweries were the top gainers.

Egypt: EGX 30 Index fell by 2.96% and closed at 16,814.00 points on Monday, the market lost LE 25.57 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.55% and closed at 1,671.20 points on Monday. Nation Media Group and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index increased by 0.76% and closed at 73,786.50 points on Monday, as the Industrial and Materials sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 461.00
INTERBANK RATES	
OPR	17.38 ▲
Overnight	17.88 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.01% to close at 9,975.87 points on Monday, as losses in the Real Estate, Energy, and Health Care sectors pushed shares lower. MSCI UAE decreased by 0.21% to close at 410.54 points.

Vietnam: VN-30 Index surged by 3.19% to close at 1,087.36 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam surged by 2.97% to close at 653.01 points.

Saudi Arabia: Tadawul All Share Index declined by 1.16% to close at 10,370.97 points on Monday, as losses in the Consumer Durables & Apparel, Food & Staples Retailing, and Utilities sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.33% to close at 1,417.61 points.

India: Nifty 50 Index decreased by 0.56% to close at 17,844.60 points on Monday, as losses in the Bank, Auto and Metal sectors pushed shares lower. MSCI India decreased by 0.44% to close at 1,974.33 points.

News

Nigeria:

NNPCL, Gambia sign MoU on oil exploration
AfDB, IsDB strike deal to boost Nigeria's,
others' pharma sector
External reserves fall by \$427m in one month
– CBN

Kenya:

World Bank clout rises as China cuts Kenya
loans
KRA Collects KES 152.14 Billion in January
KQ bailout cut further by Sh1bn

Abu Dhabi:

Deals worth Dh4.5b signed on day 1 of IDEX,
NAVDEX
Abu Dhabi issues 25,600 new licences as
business activity is booming
ADGM partners with Zand Bank to support
SMEs in Abu Dhabi

Saudi Arabia:

Telecom operator stc's net profits hit record
high after rising 8%
GAMI launches Saudi pavilion at IDEX 2023,
eyes expansion
Emaar The Economic City signs \$270m term
loan agreement with PIF

Egypt:

Egypt approves lifting taxes on imported mobile
phones components
Saudi, Emirati investors express their desire to
invest in Egyptian market
Egyptian Financial and Industrial's profits jump
148.4% in 2022

South Africa:

Sibanye-Stillwater declares maiden lithium
reserve
Amplats cuts dividend payout again as load
shedding crimps profit
Absa headline earnings dented by Ghana
sovereign debt crisis

India:

FPIs' investment value in equities dips 11% to
\$584bn
Switzerland eyes long-term free trade pact
with India
Adani group firm repays Rs 1,500 crore in
comeback strategy

Vietnam:

Vietnam to boost exports to Middle East
Vietnam to develop aquaculture with exports
of US\$12 bn
RoK's Nonsan city opens trade office in HCM
City

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,975.87	-0.01%	-0.01%	1.7%	-2.3%	AED/USD	3.67	0.0%	0.0%
Egypt	16,814.00	-3.0%	-3.9%	2.2%	15.2%	EGP/USD	30.57	0.3%	23.7%
India	17,844.60	-0.6%	-0.6%	1.0%	-1.4%	INR/USD	82.70	-0.1%	-0.1%
Kenya	1,671.20	-0.6%	-0.6%	0.8%	-0.3%	KES/USD	126.13	1.1%	2.1%
Nigeria	1,946.63	0.8%	0.8%	1.8%	5.7%	NGN/USD	460.55	0.0%	2.8%
Saudi Arabia	10,370.97	-1.2%	-1.7%	-3.9%	-1.0%	SAR/USD	3.75	0.1%	-0.2%
South Africa	73,786.50	0.8%	0.8%	0.5%	10.2%	ZAR/USD	18.10	0.3%	6.4%
Vietnam	1,087.36	3.2%	3.2%	-3.4%	8.2%	VND/USD	23,740.00	-0.3%	0.4%

MSCI Emerging Markets

MSCI Frontier	494.62	0.8%	0.8%	0.2%	4.7%	Brent Crude (\$)	83.13	0.2%	-3.2%
MSCI Frontier 100	1,137.16	0.9%	0.9%	-0.1%	4.3%	Gold (\$)	1,850.50	0.02%	1.3%
MSCI Emerging	1,005.21	0.6%	0.6%	-2.5%	5.1%	Copper (\$)	9,141.50	1.7%	9.2%
MSCI World (USD)	2,783.26	0.1%	0.1%	-0.1%	6.9%	Coffee (\$)	177.59	2.1%	13.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	5.11	7.4%	17.5%	12.93	Ecobank	12.00	-2.8%	13.2%	4.08
Airtel Africa	1620.00	3.8%	-0.9%	2939.42	Sterling	1.50	-2.0%	7.1%	8.50
Transnational Corporation	1.24	3.3%	9.7%	2.05	Lafarge Africa	25.50	-1.0%	6.3%	144.23
International Breweries	4.70	2.2%	0.0%	2.53	Guaranty	25.10	-0.2%	9.1%	923.67
United Capital	15.50	1.3%	10.7%	23.48					
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	4.28	4.28	0.0%	0.89	Nascon	11.00	9.00	22.2%	2.31
Wema	4.00	4.00	0.0%	1.07	Unilever	13.25	10.50	26.2%	0.23
Total	218.80	218.80	0.0%	67.30	Custodian	6.00	4.55	31.9%	0.09
Seplat Petroleum	1325.00	1325.00	0.0%	176.41	Cap	20.20	15.25	32.5%	3.20
P Z Cussons	10.25	10.25	0.0%	0.36	Sterling	1.50	1.13	32.7%	8.50

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
GHITHA HOLDING	79.55	15.0%	9.0%	19.83	Bank of Sharjah	0.41	-10.0%	-15.6%	0.58
Gulf Cement Co.	0.52	12.0%	-1.0%	0.00	Al Wathba National Insurance Co.	4.02	-9.9%	-9.9%	2.85
Easy Lease Motorcycle Rental	34.00	11.5%	-2.3%	12.75	National Bank of Umm Al Qaiwain	1.50	-9.1%	-16.2%	0.72
Ras Al Khaimah Poultry & Feeding Co.	2.48	7.8%	54.0%	0.35	APEX INVESTMENT	2.70	-3.2%	-22.9%	2.86
Aram Group	1.87	5.7%	-16.1%	0.00	ESHRAQ INVESTMENTS	0.49	-3.0%	-0.2%	13.93
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	Al Khazna Insurance Co.	0.24	0.24	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£)
Juhayna Food Industries	11.16	0.1%	14.0%	12.83	Ezz Steel	26.01	-5.9%	11.9%	34.42
					ELSWEDY ELECTRIC	13.40	-5.8%	11.7%	75.80
					Telecom Egypt	24.46	-5.5%	-2.5%	29.02
					Housing & Development Bank	9.71	-5.1%	-42.9%	73.35
					Fawry For Banking Technology And Electronic Payment	5.98	-4.8%	-3.2%	20.59
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	24.46	24.46	0.0%	29.02	Housing & Development Bank	9.71	9.71	0.0%	73.35
Sidi Kerir Petrochemicals -SIDPEC	19.00	19.00	0.0%	90.34	T M G Holding	9.75	9.75	0.0%	32.55
Oriental Weavers	10.96	10.96	0.0%	13.81	Taaleem Management Services	4.20	4.20	0.0%	1.81
Orascom Construction PLC	99.00	99.00	0.0%	15.71	Telecom Egypt	24.46	24.46	0.0%	29.02
Misr Fertilizers Production Co.	147.59	147.59	0.0%	4.06	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.45	2.45	0.0%	3.22

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	2902.00	2.6%	-15.0%	2136.552	Adani Enterprises Ltd	1613.00	-6.4%	-58.2%	10981.42
Ultratech Cement	7416.05	1.6%	6.6%	5278.80	Cipla	963.00	-6.1%	-10.5%	5632.12
Tech Mahindra	1145.00	1.4%	12.7%	5260.79	Britannia Inds.	4447.00	-1.9%	3.2%	1379.61
Power Grid Corp Of India	216.15	1.1%	1.1%	1107.31	Bharat Petroleum	326.05	-1.7%	-1.3%	582.21
Hindalco Industries	433.50	0.9%	-8.4%	1622.84	UPL	757.90	-1.6%	5.8%	876.21
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Ultratech Cement	7416.05	7492.00	-1.0%	5278.80	Divi's Laboratories Ltd	2902.00	2740.10	5.9%	2136.55
ITC	383.90	388.20	-1.1%	2997.97	Kotak Mahindra Bank	1737.00	1631.00	6.5%	5629.70
Larsen & Toubro	2220.50	2297.65	-3.4%	3967.58	HDFC Life Insurance Company Ltd	506.60	473.70	6.9%	3120.84
Dr Reddys Lab	4474.25	4645.00	-3.7%	686.37	Cipla	963.00	888.15	8.4%	5632.12
Hdfc Bank	1640.50	1722.10	-4.7%	6684.03	Wipro	407.00	372.40	9.3%	1318.73

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	6.68	1.5%	-1.5%	0.01	Nation Media Group	14.85	-4.2%	-6.9%	0.07
Kenya Power & Lighting Limited	1.60	1.3%	2.6%	0.47	WPP Scangroup	2.91	-4.0%	-3.3%	0.21
Kengen Limited	2.70	1.1%	-16.1%	0.40	East African Breweries Limited	174.00	-3.5%	3.9%	0.42
NCBA Group	37.45	0.3%	-4.8%	0.27	British American Tobacco Kenya Ltd	468.00	-2.4%	1.7%	3.00
					Bamburi Cement Ltd	27.25	-2.3%	-13.5%	0.26
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	161.25	161.25	0.0%	0.47	Bamburi Cement Ltd	27.25	27.25	0.0%	0.26
Absa Bank Kenya	12.50	12.95	-3.5%	7.29	Kengen Limited	2.70	2.67	1.1%	0.40
Stanbic Holdings	110.00	114.00	-3.5%	0.47	Nation Media Group	14.85	14.55	2.1%	0.07
NCBA Group Plc	37.45	40.00	-6.4%	0.27	WPP Scangroup Plc	2.91	2.80	3.9%	0.21
East African Breweries Limited	174.00	194.00	-10.3%	0.42	Kenya Reinsurance Corporation Ltd	1.82	1.75	4.0%	0.06

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Etiihad Etisalat Co.	37.00	5.7%	6.5%	214.76	Al Gassim Investment Holding Co.	23.40	-5.7%	24.5%	33.84
Arabian Internet and Communications Services Co.	246.20	3.3%	1.4%	88.19	Tihama Advertising and Public Relations Co.	77.60	-5.4%	15.8%	24.74
Saudi Steel Pipe Co.	20.68	3.0%	15.5%	7.69	Gulf Insurance Group	27.00	-4.9%	9.8%	2.61
Al-Jouf Agricultural Development Co.	53.80	2.3%	21.2%	22.37	Wataniya Insurance Co.	15.00	-4.7%	10.8%	2.79
Abdullah Al Othaim Markets Co.	111.00	2.2%	6.7%	22.77	Salama Cooperative Insurance Co.	14.22	-4.3%	9.7%	6.45
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.	157.00	157.00	0.0%	11.44	Al Alamiya for Coop Insurance Co.	12.86	12.86	0.0%	0.68
Nahdi Medical Co.	180.40	180.40	0.0%	8.95	Alkhabeer REIT Fund	7.00	7.00	0.0%	0.98
Elm Co.	377.00	377.00	0.0%	39.95	Allied Cooperative Insurance Group	11.42	11.42	0.0%	1.00
Saudi Tadawul Group Holding Co.	156.00	156.00	0.0%	37.00	Anaam International Holding Group	20.20	20.20	0.0%	8.17
ACWA POWER Co.	141.80	141.80	0.0%	11.72	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)
Anglo American	72337.00	3.9%	9.0%	84634.29	Anglo American Platinum Ltd	111845.00	-2.0%	-21.5%	48646.98
BHP Group Ltd	62173.00	3.6%	18.0%	22094.42	MultiChoice Group	12905.00	-1.0%	10.1%	8180.87
Glencore	11329.00	2.8%	-0.7%	71259.41	Mondi	32198.00	-0.9%	10.6%	42501.36
AngloGold Ashanti Ltd	33357.00	1.8%	1.3%	13977.25	Bidvest Group Ltd	23808.00	-0.8%	11.0%	28331.52
British American Tobacco	69329.00	1.7%	2.8%	24028.74	NEPI Rockcastle NV	10800.00	-0.6%	4.8%	7853.98
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	11642.00	11642.00	0.0%	9979.29	Clicks Group Ltd	27191.00	25757.00	6.9%	11153.20
Woolworths Holdings Ltd	7879.00	7900.00	-0.3%	13551.88	Mr Price Group Ltd	16478.00	15199.00	8.4%	11543.66
Bidvest Group Ltd	23808.00	24356.00	-2.2%	28331.52	Vodacom Group Ltd	12767.00	11562.00	10.4%	8039.38
Bid Corp Ltd	37600.00	39861.00	-5.7%	25039.72	MultiChoice Group	12905.00	10925.00	18.1%	8180.87
NEPI Rockcastle NV	10800.00	11299.00	-4.4%	7853.98	British American Tobacco	69329.00	58585.00	18.3%	24028.74

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers*	Last Price	1d%	YTD%	Val (mn đ)
No Va Land Invest	12450.00	6.9%	-11.1%	299.673,77					
Phat Dat Real Estate Development Corp	11700.00	6.9%	-14.0%	95.117,05					
Saigon Securities Inc	20750.00	6.7%	17.2%	477.725,69					
Vietnam Prosperity	18300.00	5.8%	2.2%	366.112,35					
Sai Gon Thuong Tin Commercial	25700.00	5.3%	14.2%	506.679,95					
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	109000.00	109000.00	0.0%	21.619,82	FPT Corp	30450.00	30450.00	0.0%	137.762,05
Vietnam JSC Bank	51200.00	51200.00	0.0%	28.978,65	Petrovietnam Gas	82800.00	82800.00	0.0%	105.001,76
Bank for Inv. and Devp	86000.00	86000.00	0.0%	7.019,44	Ho Chi Minh City Devp	15450.00	15450.00	0.0%	35.675,25
Vietcombank	93800.00	96000.00	-2.3%	102.695,06	Khang Dien House Trading & Investment	21900.00	21900.00	0.0%	533.004,66
Saigon Beer Alcohol Beverage Corp.	190200.00	197900.00	-3.9%	13.276,12	Mobile World Inv. Corp	44300.00	44300.00	0.0%	81.366,59

*No Losers on 20/2

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