

Daily Market Report

28 February 2023

JSE

JSE All-Share Index increased by 0.75% and closed at 77,513.78 points on Monday, as the Consumer Staples and Industrial sectors recorded gains.

BRVM

BRVM composite Index inched up by 0.06% and closed at 205.49 points on Monday, with Safca Côte d'Ivoire and Sicor Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index increased by 0.69% to close at 55,328.42 points on Monday, as the Consumer Goods, Oil & Gas, Insurance and Banking sectors recorded gains.

EGX

EGX 30 Index decreased by 0.67% and closed at 17,098.16 points on Monday, the market lost LE 4.65 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index was up by 0.10% to close at 824.33 points on Monday.

African Markets

Nigeria: NGX 30 Index increased by 0.54% to close at 1,979.68 points on Monday. Stanbic IBTC and Flour Mills were the top gainers.

Egypt: EGX 30 Index decreased by 0.67% and closed at 17,098.16 points on Monday, the market lost LE 4.65 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.40% and closed at 1,648.54 points on Monday. British American Tobacco Kenya and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index increased by 0.89% and closed at 71,518.04 points on Monday, as the Consumer Staples and Industrial sectors recorded gains.

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.26% to close at 9,833.30 points on Monday, as losses in the Telecommunications, Consumer Staples, and Healthcare sectors pushed shares lower. MSCI UAE decreased by 0.38% to close at 398.10 points.

Vietnam: VN-30 Index fell by 2.10% to close at 1,008.76 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 2.00% to close at 604.18 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.57% to close at 9,994.79 points on Monday, as losses in the Utilities, Food & Beverages, Healthcare Services and Banking sectors pushed shares lower. MSCI Saudi Arabia declined by 0.62% to close at 1,362.84 points.

India: Nifty 50 Index decreased by 0.42% to close at 17,392.70 points on Monday, as losses in the IT, Auto and Pharmaceutical sectors pushed shares lower. MSCI India declined by 0.68% to close at 1,917.83 points.

News

Nigeria:

Banks' Prime Lending Rate Hit 13.67% In January
Dangote Cement to pay N20 dividend per share
NLNG Ramps Up Planned 1.1m Tons P.A. LNG Supply To Nigeria

Kenya:

S&P downgrades Kenya credit ratings on debt load
Manufacturers cut 6,800 jobs despite tax incentives
Boost for medium, small firms as loan rates reduce

Abu Dhabi:

UAE to get civil aircraft manufacturing plant
UAE Central Bank balance sheet hits record \$151bn
UAE announces freezone for digital and virtual asset companies

Saudi Arabia:

Saudi-Croatian business council to be established to boost coop
SABIC Agri-Nutrients' net profit soars 92% to \$2.67bn in 2022
Saudi economy expected to grow 3% in 2023: Riyadh Capital

Capital Markets

Index	Change	Value
JSE Johannesburg Stock Exchange	▲	0.75%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.06%
NGX Nigerian Stock Exchange	▲	0.69%
EGX Egyptian Stock Exchange	▼	0.67%
ESG Casablanca Stock Exchange	▲	0.10%

Nigeria Key Indicators

Indicator	Current
Inflation	21.82%
Exchange Rate	₦ 460.97
INTERBANK RATES	
OPR	10.50 ↔
Overnight	10.81 ↔

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,833.30	-0.3%	-0.3%	0.2%	-3.7%	AED/USD	3.67	0.0%	0.0%
Egypt	17,098.16	-0.7%	0.6%	4.0%	17.1%	EGP/USD	30.63	0.0%	24.0%
India	17,392.70	-0.4%	-0.4%	-1.5%	-3.9%	INR/USD	82.65	-0.3%	-0.1%
Kenya	1,648.54	-0.4%	-0.4%	-0.5%	-1.6%	KES/USD	127.10	0.5%	2.9%
Nigeria	1,979.68	0.5%	0.5%	3.5%	7.4%	NGN/USD	460.50	0.0%	2.8%
Saudi Arabia	9,994.79	-0.6%	-1.6%	-7.4%	-4.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,518.04	0.9%	0.9%	-2.6%	6.8%	ZAR/USD	18.42	0.0%	8.2%
Vietnam	1,008.76	-2.1%	-2.1%	-10.3%	0.4%	VND/USD	23,820.00	0.1%	0.8%

MSCI Emerging Markets

MSCI Frontier	481.04	-0.4%	-0.4%	-2.5%	1.8%	Brent Crude (\$)	82.45	-0.9%	-4.0%
MSCI Frontier 100	1,103.16	-0.5%	-0.5%	-3.1%	1.1%	Gold (\$)	1,824.90	0.4%	-0.1%
MSCI Emerging	967.25	-0.5%	-0.5%	-6.2%	1.1%	Copper (\$)	8,802.00	1.0%	5.1%
MSCI World (USD)	2,721.63	0.5%	0.5%	-2.3%	4.6%	Coffee (\$)	178.96	-1.1%	14.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Stanbic IBTC	37.95	10.0%	13.5%	13.73	Transnational Corporation	1.26	-3.1%	11.5%	14.73
Flour Mills	34.95	9.0%	23.1%	50.12	United Capital PLC	15.00	-2.9%	7.1%	93.73
Sterling	1.56	3.3%	11.4%	0.40	Fidelity	5.00	-1.0%	14.9%	53.75
International Breweries	4.70	2.2%	0.0%	7.56	Nigerian Breweries	41.35	-0.4%	0.9%	32.94
Guaranty	26.00	2.0%	13.0%	190.48					
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	4.46	4.46	0.0%	19.07	Nascon	11.00	9.00	22.2%	1.62
Wema	4.00	4.00	0.0%	3.52	Unilever	13.50	10.50	28.6%	0.88
Total	218.80	218.80	0.0%	0.59	Custodian	6.00	4.55	31.9%	32.49
Seplat Petroleum	1325.00	1325.00	0.0%	6.22	Cap	20.15	15.25	32.1%	0.47
P Z Cussons	10.20	10.20	0.0%	1.58	Sterling	1.56	1.13	38.1%	0.40

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Aram Group	1.74	7.4%	-22.0%	0.00	HILY HOLDING	3.53	-10.0%	8.6%	0.00
Invictus Investment Company PLC	3.24	4.2%	-15.2%	8.25	National Corp for Tourism & Hotels	2.65	-4.7%	-11.7%	0.05
Ras Al Khaimah Poultry & Feeding Co.	2.49	4.2%	54.7%	0.00	Al Seer Marine Supplies & Equipment Co	7.54	-3.2%	-20.0%	1.63
Easy Lease Motorcycle Rental PJSC	32.50	3.8%	-6.6%	12.38	Emirates Telecom. Group Company	25.26	-1.8%	10.5%	49.00
Hayah Insurance Company	0.89	3.6%	-8.2%	0.00	Gulf Cement Co.	0.48	-1.4%	-7.7%	0.06
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 Company	2.55	2.55	0.0%	0.00	Anan Investment Holding	4.07	0.00	0.0%	0.00
Al Fujairah National Insurance Company	210.00	0.00	0.0%	0.00	The National Investor PRJSC	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 Co	1.60	1.60	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sharjah Insurance Company	1.50	1.50	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£)
GB AUTO	5.43	3.6%	1.3%	112.22	Oriental Weavers	10.97	-2.9%	5.5%	26.03
Tenth Of Ramadan Pharma Industries & Diagnostic	2.49	2.9%	-16.2%	9.62	Abu Dhabi Islamic Bank- Egypt	19.93	-2.7%	10.9%	15.98
Credit Agricole Egypt	10.20	2.1%	20.6%	8.89	Commercial International Bank	54.39	-2.0%	31.1%	257.93
Egyptian Financial Group-Hermes Holding Company	20.21	1.9%	13.0%	124.07	Sidi Kerir Petrochemicals	16.68	-1.9%	27.1%	60.59
Alexandria Mineral Oils Company	8.47	1.7%	34.0%	26.98	Cairo For Investment And Real Estate Development	13.30	-1.5%	-0.4%	0.10
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	26.17	26.17	0.0%	24.26	Housing & Development Bank	9.90	9.90	0.0%	79.94
Sidi Kerir Petrochemicals	16.68	16.68	0.0%	60.59	T M G Holding	9.60	6.50	0.0%	17.19
Oriental Weavers	10.97	10.97	0.0%	26.03	Taaleem Mgt Services	3.90	2.72	0.0%	0.09
Orascom Construction PLC	95.48	95.48	0.0%	44.38	Telecom Egypt	26.17	12.77	0.0%	24.26
Misr Fertilizers Production Company - Mopco	152.51	152.51	0.0%	4.48	Tenth Of Ramadan Pharma Industries & Diagnostic	2.49	1.62	0.0%	9.62

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Icici Bank	857.90	2.2%	-3.7%	12243.756	Adani Enterprises Limited	1187.55	-9.7%	-69.2%	12554.87
Power Grid Corp Of India	219.70	2.2%	2.8%	2881.97	Bajaj Auto	3644.95	-5.3%	0.8%	3026.51
Kotak Mahindra Bank	1727.85	1.8%	-5.4%	4029.36	UPL	708.00	-4.1%	-1.1%	1607.31
HDFC Life Insurance Company Ltd	490.50	1.6%	-13.4%	1252.23	Tata Steel	106.50	-3.0%	-5.5%	5996.13
State Bank Of India	527.50	1.2%	-14.0%	5805.92	Infosys	1510.65	-2.6%	0.2%	7429.51
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	382.20	394.00	-3.0%	3107.68	HDFC Life Insurance Company Ltd	490.50	473.70	3.5%	1252.23
Ultratech Cement	7214.90	7492.00	-3.7%	2122.68	Divi's Laboratories Limited	2862.00	2740.10	4.4%	619.51
Dr Reddys Lab	4411.00	4645.00	-5.0%	1207.95	Wipro	390.90	372.40	5.0%	1078.72
NTPC	172.50	182.95	-5.7%	3042.91	Kotak Mahindra Bank	1727.85	1631.00	5.9%	4029.36
Hdfc Bank	1598.65	1722.10	-7.2%	11379.24	Cipla	951.80	888.15	7.2%	1316.81

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	49.95	3.8%	-0.1%	0.00	British American Tobacco Kenya Ltd	459.25	-4.3%	-0.2%	6.11
Kenya Reinsurance Corporation Ltd	1.82	2.8%	-0.5%	0.04	WPP Scangroup Plc	2.92	-4.3%	-3.0%	0.01
Nation Media Group	14.90	2.1%	-6.6%	0.03	Nairobi Securities Exchange Plc	6.44	-2.1%	-5.0%	0.06
Absa Bank Kenya	12.70	1.2%	3.3%	8.05	Stanbic Holdings	107.00	-1.8%	4.9%	0.21
Kenya Power & Lighting Limited	1.59	0.6%	1.9%	0.30	Safaricom Plc	23.00	-1.5%	-4.8%	205.39
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	164.00	164.00	0.0%	6.72	Bamburi Cement Limited	27.00	27.00	0.0%	3.62
Absa Bank Kenya	12.70	12.95	-1.9%	8.05	Kengen Limited	2.48	2.48	0.0%	0.24
Stanbic Holdings	107.00	114.00	-6.1%	0.21	Nairobi Securities Exchange Plc	6.44	6.44	0.0%	0.06
East African Breweries Limited	175.00	194.00	-9.8%	1.37	Nation Media Group	14.90	14.55	2.4%	0.03
NCBA Group Plc	36.05	40.00	-9.9%	3.85	Kenya Reinsurance Corporation Ltd	1.82	1.77	2.8%	0.04

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tihama Advertising and Public Relations Co.	67.70	9.9%	1.0%	30.75	Saudi Tadawul Group Holding Co.	139.80	-6.9%	-22.8%	176.31
Saudi Industrial Export Co.	31.25	5.0%	0.8%	20.28	Eastern Province Cement Co.	39.30	-5.3%	-2.4%	2.09
Middle East Healthcare Co.	31.30	5.0%	23.0%	96.85	Mouwasat Medical Services Co.	180.00	-5.2%	-13.9%	45.43
Saudi Company for Hardware	29.00	4.7%	6.6%	3.16	ACWA POWER Co.	131.20	-4.2%	-13.7%	29.67
Advanced Petrochemical Co.	45.95	4.4%	8.1%	21.84	Saudi Arabian Mining Co.	62.50	-3.9%	-3.4%	87.28
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.	156.00	156.00	0.0%	23.68	Al Alamiya for Cooperative Insurance Co.	12.72	12.72	0.0%	1.13
Nahdi Medical Co.	174.80	174.80	0.0%	19.92	Alkhabeer REIT Fund	6.99	6.99	0.0%	0.54
Elm Co.	378.00	378.00	0.0%	30.73	Allied Cooperative Insurance Group	11.00	11.00	0.0%	1.32
Saudi Tadawul Group Holding Co.	139.80	139.80	0.0%	176.31	Anaam International Holding Group	20.30	20.30	0.0%	21.23
ACWA POWER Co.	131.20	131.20	0.0%	29.67	CHUBB Arabia Coop Insurance Co.	17.14	17.14	0.0%	0.93

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Discovery Ltd	14854.00	3.1%	20.4%	32678.80	Northam Platinum Holdings Ltd	15169.00	-2.1%	-19.0%	21995.05
Bid Corp Ltd	39586.00	2.5%	20.0%	41169.44	Anglo American Platinum Ltd	104392.00	-1.4%	-26.7%	41824.65
Investec Ltd	11586.00	2.0%	7.8%	9189.55	Capitec Bank Holdings Ltd	173750.00	-1.2%	-6.5%	47121.00
Investec PLC	11693.00	1.9%	8.6%	8755.25	Sasol Ltd	26409.00	-0.7%	-2.0%	42254.40
Naspers Ltd	323000.00	1.9%	14.4%	126913.16	Mr Price Group Ltd	15496.00	-0.7%	-2.5%	13640.51
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)
Bid Corp Ltd	39586.00	39989.00	-1.0%	41169.44	Mr Price Group Ltd	15496.00	15199.00	2.0%	13640.51
Woolworths Holdings Ltd/South Africa	7918.00	8047.00	-1.6%	31513.64	Clicks Group Ltd	26890.00	25757.00	4.4%	10615.10
NEPI Rockcastle NV	10925.00	11299.00	-3.3%	15076.50	Vodacom Group Ltd	12716.00	11562.00	10.0%	11571.56
Bidvest Group Ltd/The	23592.00	24982.00	-5.6%	18866.05	British American Tobacco PLC	70900.00	58585.00	21.0%	67355.00
Absa Group Ltd	19638.00	21100.00	-6.9%	47327.58	MultiChoice Group	13487.00	10925.00	23.5%	12273.17

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietjet Aviation	98500.00	2.4%	-10.0%	15.891,84	Masan Group Corp	79900.00	-7.0%	-14.1%	73.947,73
Vinamilk	75200.00	0.7%	-1.2%	83.487,77	No Va Land Invest	10750.00	-5.7%	-23.2%	156.510,27
					Saigon Securities Inc	18250.00	-4.0%	3.1%	274.783,55
					Mobile World Inv. Corp	40500.00	-3.8%	-5.6%	80.740,79
					Hoa Phat Group JSC	16900.00	-3.4%	-6.1%	33.668,49
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	104000.00	104000.00	0.0%	25.607,97	BaoViet Holdings	44250.00	44250.00	0.0%	41.454,81
Vietnam JSC Bank	48200.00	48200.00	0.0%	19.001,63	FPT Corp	27550.00	27550.00	0.0%	48.607,69
Bank for Inv. and Devp	83400.00	83400.00	0.0%	7.504,74	Petrovietnam Gas	80300.00	80300.00	0.0%	81.340,36
Vietcombank	92800.00	96000.00	-3.3%	46.380,77	Ho Chi Minh City Devp	13950.00	13950.00	0.0%	17.944,62
Saigon Beer Alcohol Beverage Corp.	185300.00	197900.00	-6.4%	10.740,20	Hoa Phat Group JSC	16900.00	16900.00	0.0%	33.668,49

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