

# Daily Market Report

## 1 March 2023

### JSE

JSE All-Share Index increased by 0.28% and closed at 77,733.87 points on Tuesday, as the Resources and Financial sectors recorded gains.

### BRVM

BRVM composite Index increased by 0.34% and closed at 206.18 points on Tuesday, with Total Senegal and Sode Côte d'Ivoire being the top gainers.

### NSE

NGX All-Share Index increased by 0.86% to close at 55,806.26 points on Tuesday, as the Banking, Industrial, Oil & Gas and Insurance sectors recorded gains.

### EGX

EGX 30 Index decreased by 0.56% and closed at 17,002.08 points on Tuesday, the market lost LE 3.44 billion of market cap, amid foreign selling.

### ESG

Casablanca ESG 10 Index was up by 0.33% to close at 827.04 points on Tuesday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	0.28%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.34%
<b>NGX</b> Nigerian Stock Exchange	▲	0.86%
<b>EGX</b> Egyptian Stock Exchange	▼	0.56%
<b>ESG</b> Casablanca Stock Exchange	▲	0.33%

### African Markets

**Nigeria:** NGX 30 Index increased by 0.89% to close at 1,997.24 points on Tuesday. Stanbic IBTC and Lafarge Africa were the top gainers.

**Egypt:** EGX 30 Index decreased by 0.56% and closed at 17,002.08 points on Tuesday, the market lost LE 3.44 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index was down by 0.12% and closed at 1,646.56 points on Tuesday. Kenya Power & Lighting and Kenya Reinsurance Corporation were the top losers.

**South Africa:** JSE Top 40 Index increased by 0.37% and closed at 71,779.25 points on Tuesday, as the Resources and Financial sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 460.97
<b>INTERBANK RATES</b>	
OPR	10.50 ↔
Overnight	10.83 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index was up by 0.12% to close at 9,844.81 points on Tuesday, as gains in the Consumer Staples, Telecommunications, and Real Estate sectors led shares higher. MSCI UAE increased by 0.88% to close at 401.61 points.

**Vietnam:** VN-30 Index increased by 0.61% to close at 1,014.96 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.78% to close at 608.92 points.

**Saudi Arabia:** Tadawul All Share Index climbed by 1.08% to close at 10,102.70 points on Tuesday, as gains in the Utilities, Telecommunications, and Energy sectors led shares higher. MSCI Saudi Arabia increased by 0.66% to close at 1,371.82 points.

**India:** Nifty 50 Index decreased by 0.51% to close at 17,303.95 points on Tuesday, as losses in the IT and Financial sectors pushed shares lower. MSCI India decreased by 0.42% to close at 1,909.76 points.

### News

#### Nigeria:

CBN: Nigeria records \$20m trade deficit  
Private sector gets N42tn bank loans – Report  
NGX, PAPSS sign MoU on cross-border payment

#### Kenya:

Bank loan rates increase to highest level in 52 months  
Swiss join new European hunt for Kenya investments  
KRA locks up Sh21bn cash flow for firms on tax relief suspension

#### Abu Dhabi:

UAE economy to grow 4.1% this year: World Bank  
e& buys up another 1% in UK's Vodafone  
Dubai-based F&B group gets bought by Kitopi

#### Saudi Arabia:

OPEC oil output rises in February  
Saudi-listed banks' net profit jumps 18% in January: SAMA  
SABIC's revenue rises by 13% to \$53bn in 2022

#### Egypt:

Egypt upgrades budget deficit target to 6.8% of GDP for current FY  
Egypt, Qatar sign 3 MoUs on boosting healthcare  
Egypt reduces customs taxes on mobile phone components to 2%

#### South Africa:

SA unemployment rate drops for fourth consecutive quarter  
SA's agricultural export earnings rack up \$12.8bn record in 2022  
Flooding, strikes drag Sibanye's interim profit down

#### India:

Q3 GDP slows to 4.4%, govt hopes to hit 7% for fiscal year  
Fiscal deficit touches 67.8% of full-year target at end of Jan  
NCLT reserves ruling on HDFC, HDFC Bk merger  
Vietnam:  
Feb's CPI up 0.45% due to fuel and housing price hike  
Đông Nai banana exports to surge by 25% to half million tonnes  
Big four banks launch preferential interest rate loan packages

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,844.81	0.1%	-0.1%	0.0%	-3.6%	AED/USD	3.67	0.0%	0.0%
Egypt	17,002.08	-0.6%	-1.2%	0.0%	16.5%	EGP/USD	30.63	0.0%	24.0%
India	17,303.95	-0.5%	-0.9%	0.0%	-4.4%	INR/USD	82.64	0.0%	-0.1%
Kenya	1,646.56	-0.1%	-0.5%	0.0%	-1.8%	KES/USD	127.30	0.2%	3.1%
Nigeria	1,997.24	0.9%	1.4%	0.0%	8.4%	NGN/USD	460.47	0.0%	2.8%
Saudi Arabia	10,102.70	1.1%	0.5%	0.0%	-3.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,779.25	0.4%	1.3%	0.0%	7.2%	ZAR/USD	18.34	-0.4%	7.8%
Vietnam	1,014.96	0.6%	-1.5%	0.0%	1.0%	VND/USD	23,760.00	-0.3%	0.5%

## MSCI Emerging Markets

MSCI Frontier	481.24	0.04%	-0.3%	0.0%	1.9%	Brent Crude (\$)	83.89	1.7%	-2.4%
MSCI Frontier 100	1,105.21	0.2%	-0.3%	0.0%	1.3%	Gold (\$)	1,836.70	0.6%	0.6%
MSCI Emerging	964.01	-0.3%	-0.8%	0.0%	0.8%	Copper (\$)	8,961.00	1.8%	7.0%
MSCI World (USD)	2,714.57	-0.3%	0.3%	0.0%	4.3%	Coffee (\$)	177.25	-1.0%	13.5%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Stanbic IBTC	41.70	9.9%	24.7%	60.16	Flour Mills	32.00	-8.4%	12.7%	48.76
Transnational Corporation	1.34	6.3%	18.6%	23.26	Sterling	1.52	-2.6%	8.6%	1.39
Lafarge Africa	27.40	5.4%	14.2%	133.82	Custodian	5.95	-0.8%	0.0%	17.15
Guinness	70.00	3.7%	1.0%	41.46					
Access	9.55	2.7%	12.4%	59.78					
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%	44.54	Nascon	11.20	9.00	24.4%	6.73
Wema	4.00	4.00	0.0%	2.47	Unilever	13.50	10.50	28.6%	2.76
Total	218.80	218.80	0.0%	8.66	Custodian	5.95	4.55	30.8%	17.15
Seplat Petroleum	1325.00	1325.00	0.0%	16.73	Cap	20.15	15.25	32.1%	1.62
P Z Cussons	10.20	10.20	0.0%	5.15	Sterling	1.52	1.13	34.5%	1.39

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
HILY HOLDING PJSC	4.00	13.3%	23.1%	0.01	Aram Group	1.57	-9.8%	-29.6%	0.00
Sharjah Islamic Bank	2.25	3.7%	15.4%	12.35	Gulf Medical Projects Company	1.79	-9.6%	-17.1%	0.01
Multiply Group PJSC	4.00	3.1%	-13.8%	77.53	National Marine Dredging Co.	38.10	-4.8%	55.6%	53.77
Al Yah Satellite Communications Company PJSC	2.68	3.1%	7.2%	9.43	Gulf Pharma Industries	1.03	-3.7%	-11.2%	0.33
Response Plus Holding PrJSC	5.10	2.8%	-17.6%	7.72	Easy Lease Motorcycle Rental	31.60	-2.8%	-9.2%	12.56
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	BURJEEL HOLDINGS PLC	2.00	2.00	0.0%	3.03
Al Fujairah National Insurance Company	210.00	0.00	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	0.00	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	The National Investor PRJSC	0.45	0.45	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	United Fidelity Insurance Co	1.60	1.60	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£)
Ezz Steel	28.84	3.8%	24.0%	101.82	Misr Fertilizers Production Co	143.01	-6.2%	0.4%	7.09
QALA For Financial Investments	2.22	3.3%	6.7%	135.19	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.40	-3.6%	-19.2%	13.09
ELSWEDY ELECTRIC	13.80	2.7%	15.0%	28.34	Oriental Weavers	10.61	-3.3%	2.0%	19.62
Egyptian Financial Group-Hermes Holding Company	20.65	2.2%	15.5%	139.89	Juhayna Food Industries	10.67	-2.8%	9.0%	1.13
E-finance For Digital and Financial Investments	18.60	2.1%	-2.2%	39.03	Commercial International Bank	53.11	-2.4%	21.9%	16.44
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	26.08	26.08	0.0%	28.69	Housing & Development Bank	9.75	9.75	0.0%	106.33
Sidi Kerir Petrochemicals - SIDPEC	16.64	16.64	0.0%	44.33	Cairo For Investment & Real Estate Devpt	13.30	9.51	39.9%	0.08
Oriental Weavers	10.61	10.61	0.0%	19.62	Taaleem Mgt Services	3.90	2.72	43.4%	0.04
Orascom Construction PLC	94.99	94.99	0.0%	3.16	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.40	1.62	48.1%	13.09
Misr Fertilizers Production Company - Mopco	143.01	143.01	0.0%	7.09	T M G Holding	9.79	6.50	50.6%	20.48

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	1371.35	14.9%	-64.5%	44371.533	Cipla	905.80	-4.7%	-15.8%	4943.06
Adani Ports And Sez.	590.70	5.1%	-27.8%	14907.28	Hindalco Industries	399.45	-3.0%	-15.6%	4890.72
Asian Paints	2832.85	3.0%	-8.3%	5100.33	Dr Reddys Lab	4314.00	-2.4%	1.8%	2346.63
Britannia Inds.	4467.80	1.8%	3.7%	1551.75	ONGC	152.00	-2.1%	3.6%	2696.07
Mahindra & Mahindra	1275.35	1.4%	2.1%	4346.65	Reliance Industries	2319.95	-2.0%	-8.9%	23690.37
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	7259.00	7492.00	-3.1%	3103.88	Cipla	905.80	902.00	0.4%	4943.06
Britannia Inds.	4467.80	4669.20	-4.3%	1551.75	HDFC Life Insurance Company	488.90	473.70	3.2%	1597.10
ITC	376.50	394.00	-4.4%	6179.54	Divi's Laboratories	2835.25	2740.10	3.5%	967.41
Hdfc Bank	1603.00	1722.10	-6.9%	15173.64	Wipro	387.30	372.40	4.0%	1953.26
Dr Reddys Lab	4314.00	4645.00	-7.1%	2346.63	Kotak Mahindra Bank	1731.95	1631.00	6.2%	7608.53

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	2.98	2.1%	-1.0%	0.01	Kenya Power & Lighting Limited	1.51	-5.0%	-3.2%	2.10
Bamburi Cement Limited	27.50	1.9%	-12.7%	4.90	Kenya Reinsurance Corporation Ltd	1.77	-2.7%	-3.3%	0.07
NCBA Group Plc	36.70	1.8%	-6.7%	10.94	Stanbic Holdings	105.00	-1.9%	2.9%	0.06
Nairobi Securities Exchange Plc	6.54	1.6%	-3.5%	0.08	Absa Bank Kenya	12.50	-1.6%	1.6%	1.28
Safaricom Plc	23.30	1.3%	-3.5%	87.22	British American Tobacco Kenya Ltd	454.25	-1.1%	-1.3%	17.31
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	163.50	164.00	-0.3%	10.82	Kenya Reinsurance Corporation Ltd	1.77	1.77	0.0%	0.07
Absa Bank Kenya	12.50	12.95	-3.5%	1.28	Kengen Limited	2.49	2.48	0.4%	0.29
Stanbic Holdings	105.00	114.00	-7.9%	0.06	Nation Media Group	14.75	14.55	1.4%	0.03
NCBA Group Plc	36.70	40.00	-8.2%	10.94	Nairobi Securities Exchange Plc	6.54	6.44	1.6%	0.08
The Cooperative Bank of Kenya Ltd	12.65	14.00	-9.6%	3.01	Bamburi Cement Limited	27.50	27.00	1.9%	4.90

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Nahdi Medical Co.	186.60	6.8%	11.6%	50.87	Saudi Public Transport Co.	17.26	-4.0%	8.3%	27.15
Middle East Healthcare Co.	33.30	6.4%	30.8%	61.21	Saudi Basic Industries Corp.	88.50	-3.7%	-1.0%	371.56
ACWA POWER Co.	139.40	6.3%	-8.3%	57.72	Al Hammadi Co for Development and Investment	47.65	-2.8%	18.8%	15.95
Alinma Bank	29.45	5.9%	-9.5%	195.50	Astra Industrial Group	59.40	-2.6%	14.9%	14.02
Ethiad Etisalat Co.	39.10	5.7%	12.5%	195.87	Saudi Industrial Investment Group	22.34	-2.6%	1.6%	33.97
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.	156.40	156.40	0.0%	5.11	Al Alamiya for Coop Insurance Co.	12.64	12.64	0.0%	0.47
Nahdi Medical Co.	186.60	186.60	0.0%	50.87	Alkhabeer REIT Fund	6.99	6.99	0.0%	0.16
Elm Co.	379.00	379.00	0.0%	61.88	Allied Cooperative Insurance Group	11.00	11.00	0.0%	0.68
Saudi Tadawul Group Holding Co.	142.80	142.80	0.0%	102.77	Amana Cooperative Insurance Co.	9.78	9.78	0.0%	5.97
ACWA POWER Co.	139.40	139.40	0.0%	57.72	CHUBB Arabia Coop Insurance Co.	17.00	17.00	0.0%	1.09

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MultiChoice Group	14100.00	4.6%	20.3%	47376.00	Woolworths Holdings Ltd	7700.00	-2.8%	15.9%	80388.00
Reinet Investments SCA	36300.00	2.8%	10.9%	23561.24	Anglo American Platinum Ltd	101722.00	-2.6%	-28.6%	52047.08
Sanlam Ltd	5983.00	2.5%	22.8%	83881.66	Aspen Pharmacare Holdings Ltd	14189.00	-2.5%	4.1%	31215.80
Sasol Ltd	27034.00	2.4%	0.3%	47850.18	Mr Price Group Ltd	15227.00	-1.7%	-4.2%	21165.53
Exxaro Resources Ltd	20112.00	2.1%	-7.5%	31173.60	British American Tobacco PLC	71169.00	-1.1%	5.6%	57750.09
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	40220.00	40220.00	0.0%	76418.00	Mr Price Group Ltd	15227.00	15199.00	0.2%	21165.53
Woolworths Holdings Ltd	7918.00	8047.00	-1.6%	82663.92	Clicks Group Ltd	26750.00	25757.00	3.9%	25490.34
NEPI Rockcastle NV	11017.00	11299.00	-2.5%	31398.45	Vodacom Group Ltd	12671.00	11562.00	9.6%	22681.09
Absa Group Ltd	19845.00	21100.00	-5.9%	66877.65	British American Tobacco PLC	71169.00	58585.00	21.5%	57750.09
Bidvest Group Ltd/The	23433.00	24982.00	-6.2%	33743.52	MultiChoice Group	14100.00	10925.00	29.1%	47376.00

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vincom Retail	26700.00	3.7%	1.5%	81.069.53	Techcombank	26500.00	-1.9%	2.5%	56483.86
Masan Group Corp	82000.00	2.6%	-11.8%	47743.18	No Va Land Invest	10600.00	-1.4%	-24.3%	76930.19
Vietjet Aviation	100000.00	1.5%	-8.7%	31.408.10	Mobile World Inv. Corp	40000.00	-1.2%	-6.8%	63.235.50
Vinhomes	41500.00	1.5%	-13.5%	67138.32	Phat Dat Real Estate Development Corp	10100.00	-1.0%	-25.7%	28135.50
Saigon Beer Alcohol Beverage Corp.	188000.00	1.5%	12.6%	18308.91	Vietnam JSC Bank	27400.00	-0.5%	0.6%	35358.89
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	93500.00	96000.00	-2.6%	52.798.87	Vietnam Rubber Group JSC	13950.00	13950.00	0.0%	12643.49
Saigon Beer Alcohol Beverage Corp.	188000.00	197900.00	-5.0%	18308.91	Mobile World Inv. Corp	40000.00	40000.00	0.0%	63.235.50
Bank for Inv. and Devp	44100.00	49950.00	-11.7%	11415.54	No Va Land Invest	10600.00	10600.00	0.0%	76930.19
Vinamilk	75500.00	87004.15	-13.2%	78109.52	Phat Dat Real Estate Development Corp	10100.00	10100.00	0.0%	28135.50
Asia Commercial JS Bank	24400.00	29080.00	-16.1%	149929.92	Vinhomes	41500.00	41500.00	0.0%	67138.32

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