

Daily Market Report

13 March 2023

JSE

JSE All-Share Index dropped by 1.56% and closed at 76,454.36 points on Friday, as the Industrial and Energy sectors recorded losses.

BRVM

BRVM composite Index increased by 0.42% and closed at 207.85 points on Friday, with Bank of Africa - Côte d'Ivoire and Total Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index inched down by 0.05% to close at 55,794.51 points on Friday, as the Oil & Gas, Banking and Insurance sectors recorded losses.

EGX

EGX 30 Index fell by 3.14% and closed at 15,936.89 points on Sunday, as the market lost LE 29.02 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index was down by 0.18% to close at 799.35 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	1.56%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.42%
NGX Nigerian Stock Exchange	▼	0.05%
EGX Egyptian Stock Exchange	▼	3.14%
ESG Casablanca Stock Exchange	▼	0.18%

African Markets

Nigeria: NGX 30 Index marginally decreased by 0.04% to close at 1,991.88 points on Friday. UBA and Zenith were the top losers.

Egypt: EGX 30 Index fell by 3.14% and closed at 15,936.89 points on Sunday, as the market lost LE 29.02 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.46% and closed at 1,608.44 points on Friday. Nairobi Securities Exchange and Kenya Power & Lighting Limited were the top losers.

South Africa: JSE Top 40 Index dropped by 1.60% and closed at 70,692.59 points on Friday, as the Industrial and Energy sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 461.02
INTERBANK RATES	
OPR	10.50 ↔
Overnight	10.81 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.33% to close at 9,827.79 points on Friday, as losses in the Industrials, Health Care and Utilities sectors pushed shares lower. MSCI UAE decreased by 0.29% to close at 396.46 points.

Vietnam: VN-30 Index decreased by 0.29% to close at 1,047.20 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.54% to close at 628.03 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.76% to close at 10,383.82 points on Sunday, as losses in the Software & Services, Telecommunication Services and Banks sectors pushed shares lower. MSCI Saudi Arabia declined by 0.97% and closed at 1,409.41 points.

India: Nifty 50 Index declined by 1.00% to close at 17,412.90 points on Friday, as losses in the Media, Bank and Auto sectors pushed shares lower. MSCI India declined by 0.66% to close at 1,928.35 points.

News

Nigeria:

Nigeria's raw material imports soar to N2.4tn – NBS
5G rollout raises telecom foreign investment by 129%
Private sector contracted in February amid cash crunch

Kenya:

World Bank expands Kenya loan kitty to Sh129 billion
Dollar shortage to worsen as dividends repatriation starts
Venture capital beats private equity in new deals

Abu Dhabi:

New initiative to boost Emiratisation in industrial sector launched
Abu Dhabi's Royal Group mulls takeover of SVB's UK unit
Agthia Group eyeing \$1.63bn annual revenue by 2025

Saudi Arabia:

Saudi Aramco reports record profit of \$161.1bn in 2022
Saudi Crown Prince launches new national carrier Riyadh Air
Saudi Arabia launches \$1bn initiative for SMEs supply chains

Egypt:

Goldman Sachs expects CBE to raise interest rates by 300
Banque Misr, Mastercard coop to bolster digital payments portfolio
Egypt plans for withdrawal from UN grain treaty

South Africa:

South Africa sells R1.2bn of inflation-linked bonds at auction
Standard Bank plans Kenyan bank acquisition by 2025
Northam ups RBPlat ante as it expects strong interims ahead

India:

Net direct tax collection reaches Rs 13.73 lakh crore
January factory output growth robust at 5.2%
Adani Group prepays \$2.2 billion worth share-backed loans

Vietnam:

Vietnam, RoK target 100 billion USD in two-way trade in 2023
M&A deals to boost non-life insurance industry
Novaland expects to issue 2.9 bil shares this year

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,827.79	-0.3%	0.0%	-0.2%	-3.8%	AED/USD	3.67	0.0%	0.0%
Egypt	15,936.89	-3.1%	-3.1%	-6.3%	9.2%	EGP/USD	30.74	-0.5%	24.4%
India	17,412.90	-1.0%	0.0%	0.6%	-3.8%	INR/USD	81.97	-0.1%	-0.9%
Kenya	1,608.44	-0.5%	0.0%	-2.3%	-4.0%	KES/USD	128.37	-0.6%	3.9%
Nigeria	1,991.88	-0.04%	0.0%	-0.3%	8.1%	NGN/USD	460.52	0.0%	2.8%
Saudi Arabia	10,383.82	-0.8%	-0.8%	2.8%	-0.9%	SAR/USD	3.75	0.0%	-0.1%
South Africa	70,692.59	-1.6%	0.0%	-1.5%	5.6%	ZAR/USD	18.32	-0.9%	7.6%
Vietnam	1,047.20	-0.3%	0.0%	3.2%	4.2%	VND/USD	23,675.00	-0.1%	0.2%

MSCI Emerging Markets

MSCI Frontier	483.02	0.4%	0.0%	0.4%	2.3%	Brent Crude (\$)	82.78	1.5%	-3.6%
MSCI Frontier 100	1,108.78	0.04%	0.0%	0.3%	1.7%	Gold (\$)	1,867.20	1.8%	2.2%
MSCI Emerging	955.28	-1.4%	0.0%	-0.9%	-0.1%	Copper (\$)	8,867.00	0.2%	5.9%
MSCI World (USD)	2,657.41	-1.3%	0.0%	-2.1%	2.1%	Coffee (\$)	170.11	-0.9%	8.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	2.10	5.0%	5.0%	9.30	UBA	8.25	-1.8%	8.6%	115.23
Guinness	70.00	1.4%	1.0%	15.94	Zenith	25.80	-0.8%	7.5%	341.50
Sterling	1.50	0.7%	7.1%	0.65	United Capital PLC	14.65	-0.7%	4.6%	98.61
					Lafarge Africa	26.40	-0.2%	10.0%	32.87
					Guaranty	26.50	-0.2%	15.2%	99.72
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	4.31	4.31	0.0%	0.25	Unilever	13.50	10.50	28.6%	5.38
Wema	4.30	4.30	0.0%	0.12	Custodian	5.90	4.55	29.7%	0.74
Total	218.80	218.80	0.0%	92.60	Cap	20.20	15.25	32.5%	1.34
Seplat Petroleum	1200.00	1200.00	0.0%	7.80	Sterling	1.50	1.13	32.7%	0.65
P Z Cussons	10.75	10.75	0.0%	2.80	Nascon	12.20	9.00	35.6%	2.49

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Takaful Co.	5.26	14.9%	-18.3%	0.01	Hayah Insurance Co.	0.84	-9.9%	-13.9%	0.09
PALMS SPORTS	10.50	1.9%	7.1%	11.89	Ras Al Khaimah Poultry & Feeding Co.	2.10	-9.9%	30.4%	0.03
Abu Dhabi National Oil Company For Distribution	4.30	1.7%	-2.5%	36.01	APEX INVESTMENT	2.40	-4.4%	-31.4%	2.03
Bank of Sharjah	0.40	1.3%	-16.7%	0.06	The National Bank of Ras Al Khaimah	4.87	-2.6%	3.6%	0.21
Abu Dhabi National Co. for Building Materials	0.16	1.3%	-12.6%	0.01	Methaq Takaful Insurance Company	0.60	-2.6%	-5.0%	0.05
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 Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	BURJEEL HOLDINGS	2.00	2.00	0.0%	6.19
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Gulf Pharmaceutical Industries	1.00	1.00	0.0%	0.03
Invest Bank	0.45	0.45	0.0%	0.00	APEX INVESTMENT	2.40	2.40	0.0%	2.03
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	Manazel	0.34	0.34	0.0%	2.56
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	The National Investor	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£)
Egyptian Kuwaiti Holding	36.12	0.7%	14.6%	9.24	E-finance For Digital and Financial Investments	16.06	-7.8%	-15.5%	13.75
					GB AUTO	4.81	-7.7%	-10.3%	31.01
					Ezz Steel	27.80	-7.3%	19.6%	41.25
					ELSWEDY ELECTRIC	12.82	-6.8%	6.8%	36.71
					Fawry For Banking Tech & Electronic Payment	5.01	-6.7%	-10.3%	31.01
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	25.45	25.45	0.0%	24.46	Housing & Development Bank	8.45	8.45	0.0%	29.42
Sidi Kerir Petrochemicals	16.40	16.40	0.0%	28.90	Cleopatra Hospital Co.	4.88	3.81	28.1%	0.37
Oriental Weavers	11.29	11.29	0.0%	16.15	T M G Holding	8.70	6.50	33.8%	21.93
Orascom Construction	89.48	89.48	0.0%	9.81	Ibnsina Pharma	1.52	1.10	38.1%	3.66
Misir Fertilizers Production Co.	140.00	140.00	0.0%	9.69	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.25	1.62	38.9%	2.44

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	436.80	1.1%	12.6%	4535.047	Adani Enterprises Ltd	1894.20	-3.0%	-50.9%	17800.11
NTPC	180.95	0.8%	8.7%	2233.80	Hdfc Bank	1588.10	-2.6%	-2.5%	21833.46
Maruti Suzuki India	8600.00	0.7%	2.4%	4421.11	Apollo Hospitals Enterprise Ltd	4315.00	-2.3%	-3.6%	1418.03
Britannia Inds.	4310.00	0.4%	0.1%	1584.97	HDFC	2612.00	-2.1%	-1.0%	11465.00
Power Grid Corp Of India	226.65	0.4%	6.1%	1627.62	Indusind Bank	1146.00	-2.0%	-6.1%	3746.17
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
NTPC	180.95	182.95	-1.1%	2233.80	Cipla	881.60	869.05	1.4%	1511.03
ITC	388.20	394.00	-1.5%	3244.39	Divi's Laboratories Ltd	2788.00	2740.10	1.7%	924.30
Ultratech Cement	7221.40	7492.00	-3.6%	1111.22	HDFC Life Insurance Company Ltd	490.50	473.70	3.5%	1163.31
Dr Reddys Lab	4378.75	4645.00	-5.7%	1480.58	Tata Consumer products Ltd.	705.10	678.30	4.0%	685.29
Bajaj Auto	3821.00	4131.75	-7.5%	2028.91	Reliance Industries	2326.00	2234.15	4.1%	14301.52

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	49.70	2.2%	-0.6%	3.15	Nairobi Securities Exchange	6.26	-5.7%	-7.7%	0.10
Stanbic Holdings	108.75	1.4%	6.6%	0.62	Kenya Power & Lighting Limited	1.38	-2.8%	-11.5%	0.70
NCBA Group	36.80	1.2%	-6.5%	1.14	Safaricom	20.60	-1.7%	-14.7%	29.72
Absa Bank Kenya	12.55	1.2%	2.0%	0.69	Kenya Reinsurance Corporation Ltd	1.70	-1.2%	-7.1%	0.02
Standard Chartered Bank Kenya Ltd	167.00	0.6%	17.0%	29.07	East African Breweries Limited	169.75	-0.7%	1.3%	4.06
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	167.00	167.00	0.0%	29.07	Kengen Limited	2.32	2.32	0.0%	0.45
Absa Bank Kenya	12.55	12.95	-3.1%	0.69	Kenya Reinsurance Corporation Ltd	1.70	1.70	0.0%	0.02
Stanbic Holdings	108.75	114.00	-4.6%	0.62	Safaricom Plc	20.60	20.60	0.0%	29.72
NCBA Group Plc	36.80	40.00	-8.0%	1.14	Total Kenya Ltd	19.15	19.10	0.3%	0.22
The Coop Bank of Kenya Ltd	12.50	14.00	-10.7%	0.65	Nation Media Group	14.75	14.55	1.4%	0.05

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Shipping Company of Saudi Arabia	29.90	9.9%	1.4%	48.53	Bank Albilad	38.00	-3.6%	-14.5%	41.65
National Agricultural Marketing Co.	33.40	9.9%	94.2%	13.99	Theeb Rent a Car Co	74.40	-3.3%	7.8%	27.81
Saudi Ground Services Co.	22.82	5.2%	4.5%	69.07	Riyad Bank	28.35	-3.1%	-10.8%	46.03
Wafrah for Industry and Development Co.	33.90	4.5%	32.4%	75.96	Saudi Arabian Amiantit Co.	37.45	-2.9%	15.2%	7.06
Jabal Omar Development Co.	19.08	3.8%	15.6%	68.08	Ataa Educational Co.	56.60	-2.8%	3.9%	15.99
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)
Riyadh Cables Group Co.	46.60	46.60	0.0%	22.08	Al Alamiya for Coop Insurance Co.	12.72	12.72	0.0%	0.40
Alamar Foods Co.	150.20	150.20	0.0%	2.16	Alkhabeer REIT Fund	6.81	6.81	0.0%	1.31
Nahdi Medical Co.	183.60	183.60	0.0%	13.25	Allied Cooperative Insurance Group	10.86	10.86	0.0%	0.30
Elm Co.	393.00	393.00	0.0%	16.63	Amana Cooperative Insurance Co.	9.80	9.80	0.0%	4.42
Saudi Tadawul Group Holding Co.	142.00	142.00	0.0%	17.69	CHUBB Arabia Coop Insurance Co.	17.34	17.34	0.0%	0.97

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Aspen Pharmacare Holdings Ltd	18694.00	5.0%	37.1%	66550.64	Naspers Ltd	304970.00	-3.7%	8.0%	200148.76
Gold Fields Ltd	17520.00	3.4%	-0.5%	47829.60	Prosus NV	125691.00	-3.6%	6.7%	167169.03
AngloGold Ashanti Ltd	32629.00	2.8%	-0.9%	71131.22	Capitec Bank Holdings Ltd	168873.00	-3.6%	-9.1%	38867.81
Sibanye Stillwater Ltd	3782.00	1.7%	-15.4%	62251.72	Investec Ltd	10906.00	-3.2%	1.5%	5265.20
Sanlam Ltd	5927.00	1.5%	21.7%	36569.59	Investec	11058.00	-3.2%	2.7%	15370.62
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)
NEPI Rockcastle NV	11226.00	11300.00	-0.7%	14032.50	Mr Price Group Ltd	14534.00	14534.00	0.0%	9519.48
Bid Corp Ltd	40450.00	40961.00	-1.2%	46113.00	Clicks Group Ltd	26620.00	25757.00	3.4%	10406.02
Bidvest Group Ltd/The	26508.00	26979.00	-1.7%	40557.24	Vodacom Group Ltd	12702.00	11562.00	9.9%	12447.96
Absa Group Ltd	18762.00	21100.00	-11.1%	68481.30	British American Tobacco PLC	68610.00	58585.00	17.1%	107031.60
Woolworths Holdings Ltd	6865.00	8047.00	-14.7%	22173.95	MultiChoice Group	14144.00	10925.00	29.5%	15558.40

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Masan Group Corp	83900.00	3.8%	-9.8%	116.554,77	No Va Land Invest	10650.00	-2.7%	-23.9%	82.996,49
Vincom Retail	28000.00	3.7%	6.5%	63.428,44	Techcombank	27150.00	-2.3%	5.0%	58.084,27
Vinhomes	42850.00	1.1%	-10.7%	108.403,03	Vietnam National Petroleum Group	38150.00	-2.2%	20.3%	25.035,38
Vietnam Prosperity	18300.00	0.6%	2.2%	268.074,75	Tien Phong Commercial Joint Stock Bank	24000.00	-2.0%	14.0%	65.395,82
Vinamilk	76900.00	0.5%	1.1%	109.646,65	Sai Gon Thuong Tin Commercial	26000.00	-1.9%	15.6%	618.896,03
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	92100.00	96000.00	-4.1%	65.143,55	Vietnam Rubber Group	15000.00	15000.00	0.0%	40.333,92
Bank for Inv. and Devp	47150.00	49950.00	-5.6%	40.609,09	Mobile World Inv. Corp	39750.00	39750.00	0.0%	62.425,91
Saigon Beer Alcohol Beverage Corp.	185600.00	197900.00	-6.2%	49.763,85	No Va Land Invest	10650.00	10650.00	0.0%	82.996,49
Vinamilk	76900.00	87004.15	-11.6%	109.646,65	Phat Dat Real Estate Development Corp	11750.00	11750.00	0.0%	40.546,22
Asia Commercial JS Bank	24900.00	29080.00	-14.4%	60.435,74	Vinhomes	42850.00	42850.00	0.0%	108.403,03

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