

Daily Market Report

14 March 2023

JSE

JSE All-Share Index dropped by 1.25% and closed at 75,502.31 points on Monday, as the Chemical and Energy sectors recorded losses.

BRVM

BRVM composite Index inched down by 0.03% and closed at 207.79 points on Monday, with Bank of Africa – Senegal and Setao Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index inched down by 0.01% to close at 55,788.37 points on Monday, as the Banking, Industrial and Insurance sectors recorded losses.

EGX

EGX 30 Index fell by 3.13% and closed at 15,438.50 points on Monday, as the market lost LE 35.05 billion of marker cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.44% to close at 802.86 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	1.25%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.03%
NGX Nigerian Stock Exchange	▼	0.01%
EGX Egyptian Stock Exchange	▼	3.13%
ESG Casablanca Stock Exchange	▲	0.44%

African Markets

Nigeria: NGX 30 Index marginally decreased by 0.005% to close at 1,991.79 points on Monday. Zenith and Sterling were the top losers.

Egypt: EGX 30 Index fell by 3.13% and closed at 15,438.50 points on Monday, as the market lost LE 35.05 billion of marker cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.65% and closed at 1,598.03 points on Monday. Safaricom Plc and Kengen Limited were the top losers.

South Africa: JSE Top 40 Index dropped by 1.36% and closed at 69,731.56 points on Monday, as the Chemical and Energy sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 461.01
INTERBANK RATES	
OPR	10.50 ↔
Overnight	10.83 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.71% to close at 9,757.84 points on Monday, as losses in the Real Estate, Financials and Utilities sectors pushed shares lower. MSCI UAE dropped by 1.63% to close at 389.99 points.

Vietnam: VN-30 Index increased by 0.27% to close at 1,050.07 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.53% to close at 631.34 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.76% to close at 10,305.09 points on Monday, as losses in the Media and Entertainment, Telecommunication Services and Capital Goods sectors pushed shares lower. MSCI Saudi Arabia declined by 1.10% and closed at 1,393.85 points.

India: Nifty 50 Index dropped by 1.49% to close at 17,154.30 points on Monday, as losses in the Bank, Auto and Financial Services sectors pushed shares lower. MSCI India declined by 1.37% to close at 1,901.95 points.

News

Nigeria:

Nigeria records first foreign portfolio surplus in five years
Pension investments in FGN securities rise to N9.64tr
Economy loses N20tn on CBN's 70% cash mop-up – Report

Kenya:

Kenya signs 6-Month deal to nationalize oil imports
Tea Earnings Hit KES 138 Billion in 2022 on Weakening Shilling
Europe's inflation cuts Sh12bn horticulture income

Abu Dhabi:

Borouge shareholders approve \$650 million dividend
Dubai's GMG announces massive Egypt expansion
Dubai real estate to be stable in 2023 despite global headwinds

Saudi Arabia:

Saudi & South Korea deepen trade and economic ties with 10 MoUs
Saudi ports record close to 8% growth in container traffic in Feb
Kingdom's HR fund launches new strategy to ensure sustainable devpt

Egypt:

SVB's collapse has no impacts on Egyptian Banks: CBE
Egypt's central bank issues LE 2.5B in T-bonds Monday
EFG Hermes completes advisory on ADNOC Gas' \$2.5B IPO

South Africa:

Absa declares an annual dividend of R13 per share
MTN downgrades mid-term margin target for SA on power outages
Premier Group revives listing plans, new date is March 24

India:

Retail inflation in February above RBI's comfort level
Govt proposes additional net expenditure of Rs 1.48 trn for 22/23
Russian oil flows rebound as India snaps up more pacific cargoes

Vietnam:

WB forecasts Vietnam's 2023 growth at 6.3%
Domestic trade to grow at 8-9 per cent a year: MoIT
Investment capital in Ba Ria-Vung Tau slows in Q1

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,757.84	-0.7%	-0.7%	-0.9%	-4.4%	AED/USD	3.67	0.0%	0.0%
Egypt	15,438.50	-3.1%	-6.2%	-9.2%	5.8%	EGP/USD	30.90	0.5%	25.1%
India	17,154.30	-1.5%	-1.5%	-0.9%	-5.3%	INR/USD	82.35	0.5%	-0.5%
Kenya	1,598.03	-0.6%	-0.6%	-2.9%	-4.7%	KES/USD	129.80	1.1%	5.1%
Nigeria	1,991.79	-0.005%	-0.005%	-0.3%	8.1%	NGN/USD	460.50	0.0%	2.8%
Saudi Arabia	10,305.09	-0.8%	-1.5%	2.0%	-1.7%	SAR/USD	3.75	0.0%	-0.1%
South Africa	69,731.56	-1.4%	-1.4%	-2.9%	4.1%	ZAR/USD	18.17	-0.9%	6.7%
Vietnam	1,050.07	0.3%	0.3%	3.5%	4.5%	VND/USD	23,587.50	-0.4%	-0.2%

MSCI Emerging Markets

MSCI Frontier	481.02	-0.4%	-0.4%	-0.05%	1.8%	Brent Crude (\$)	80.77	-2.4%	-6.0%
MSCI Frontier 100	1,100.89	-0.7%	-0.7%	-0.4%	0.9%	Gold (\$)	1,916.50	2.6%	4.9%
MSCI Emerging	961.50	0.7%	0.7%	-0.3%	0.5%	Copper (\$)	8,931.00	0.7%	6.7%
MSCI World (USD)	2,643.64	-0.5%	-0.5%	-2.6%	1.6%	Coffee (\$)	171.96	1.1%	10.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	4.33	0.5%	12.5%	3.80	Zenith	25.00	-3.1%	4.2%	374.26
United Capital	14.70	0.3%	5.0%	132.75	Sterling	1.46	-2.7%	4.3%	23.08
					FBNH	10.75	-2.3%	-1.4%	17.20
					Transnational Corp	1.35	-2.2%	19.5%	26.60
					Guaranty	26.00	-1.9%	13.0%	112.25
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	4.33	4.33	0.0%	3.80	Unilever	13.50	10.50	28.6%	4.61
Wema	4.30	4.30	0.0%	0.08	Sterling	1.46	1.13	29.2%	23.08
Total	218.80	218.80	0.0%	74.46	Custodian	5.90	4.55	29.7%	0.95
Sepilat Petroleum	1200.00	1200.00	0.0%	19.48	Cap	20.15	15.25	32.1%	4.97
P Z Cussons	10.75	10.75	0.0%	1.06	Nascon	12.20	9.00	35.6%	8.81

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sudatel Telecommunications Group Company Limited	0.44	4.3%	-4.6%	0.07	Emirates Insurance Co.	7.20	-9.9%	5.9%	0.01
Hayah Insurance Company	0.87	4.2%	-10.3%	0.00	FOODCO NATIONAL FOODSTUFF	2.52	-9.7%	0.0%	0.08
The National Bank of Ras Al Khaimah	5.00	2.7%	6.4%	2.21	Methaq Takaful Insurance Compnay	0.56	-8.1%	-12.7%	0.04
Abu Dhabi National Co. for Building Materials	0.16	1.9%	-10.9%	0.00	ESG EMIRATES STALLIONS GROUP	5.53	-7.8%	-28.7%	10.82
National Marine Dredging Co.	39.50	1.5%	61.4%	46.97	Multiply Group	3.58	-5.0%	-22.8%	59.21
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	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	The National Investor	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
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	Union Insurance Co.	0.50	0.50	0.0%	0.00
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	United Fidelity Insurance Company	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£)
E-finance For Digital and Financial Investments	16.29	1.4%	-14.3%	15.42	Ibnsina Pharma	1.35	-11.1%	-37.4%	8.76
Orascom Construction	89.95	0.5%	-6.3%	14.72	Palm Hills Development Co.	1.77	-9.2%	-9.7%	17.99
Edita Food Industries S.A.E	14.05	0.4%	1.2%	2.67	Credit Agricole Egypt	8.48	-8.5%	0.2%	9.92
T M G Holding	8.73	0.3%	-12.6%	29.71	Medinet Nasr Housing	3.00	-8.3%	-7.7%	39.48
					QALA For Financial Investments	1.82	-7.6%	16.6%	52.22
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	25.25	25.25	0.0%	29.09	Housing & Development Bank Cairo For Investment And Real Estate Development	7.87	7.87	0.0%	35.21
Sidi Kerir Petrochemicals	15.30	15.30	0.0%	52.22	Ibnsina Pharma	1.35	1.10	22.9%	8.76
Oriental Weavers	10.81	10.81	0.0%	33.07	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.17	1.62	34.0%	4.18
Orascom Construction	89.95	89.95	0.0%	14.72	T M G Holding	8.73	6.50	34.3%	29.71
Misr Fertilizers Production Co.	138.00	138.00	0.0%	11.59					

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1134.00	6.9%	11.6%	14971.300	Indusind Bank	1060.85	-7.3%	-13.1%	13183.01
Apollo Hospitals Enterprise Ltd	4349.00	0.7%	-2.9%	2169.47	State Bank Of India	529.95	-3.2%	-13.6%	7726.17
Britannia Inds.	4322.20	0.3%	0.3%	1220.60	Tata Motors	423.10	-2.9%	9.1%	3748.17
ONGC	156.00	0.1%	6.3%	1376.99	Mahindra & Mahindra	1193.00	-2.8%	-4.5%	4623.01
					Adani Ports And Sez.	679.00	-2.7%	-17.0%	6710.89
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	179.80	182.95	-1.7%	2465.65	Tata Consumer products Ltd.	695.70	691.75	0.6%	808.61
ITC	386.05	394.00	-2.0%	3385.75	Reliance Industries	2288.00	2275.00	0.6%	13601.85
Ultratech Cement	7090.75	7492.00	-5.4%	1259.85	Divi's Laboratories Ltd	2766.00	2740.10	0.9%	1556.37
Dr Reddys Lab	4381.00	4645.00	-5.7%	709.61	Cipla	877.35	869.05	1.0%	1491.74
Britannia Inds.	4322.20	4669.20	-7.4%	1220.60	HDFC Life Insurance Company Ltd	479.50	473.70	1.2%	1383.56

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corp Ltd	1.74	2.4%	-4.9%	0.04	Safaricom	19.60	-4.9%	-18.8%	63.25
Stanbic Holdings	111.00	2.1%	8.8%	0.69	Kengen Limited	2.24	-3.4%	-30.4%	0.50
Bamburi Cement Limited	28.50	1.6%	-9.5%	0.05	Nairobi Securities Exchange	6.06	-3.2%	-10.6%	0.21
Absa Bank Kenya	12.70	1.2%	3.3%	0.51	Nation Media Group	14.30	-3.1%	-10.3%	0.14
Centum Investment Company	9.02	0.9%	7.9%	1.99	WPP Scangroup	2.95	-1.7%	-2.0%	0.11
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%	35.60	Kengen Limited	2.24	2.24	0.0%	0.50
Absa Bank Kenya	12.70	12.95	-1.9%	0.51	Total Kenya Ltd	19.00	19.00	0.0%	1.01
Stanbic Holdings	111.00	114.00	-2.6%	0.69	Nairobi Securities Exchange	6.06	6.06	0.0%	0.21
NCBA Group Plc	37.00	40.00	-7.5%	0.74	Nation Media Group	14.30	14.30	0.0%	0.14
The Cooperative Bank of Kenya Ltd	12.35	14.00	-11.8%	1.68	Safaricom Plc	19.60	19.60	0.0%	63.25

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Jabal Omar Development Co.	20.12	5.5%	21.9%	148.44	Arab National Bank	24.90	-5.9%	-22.3%	31.41
Saudi Pharmaceutical Industries and Medical Appliances Corp.	23.78	5.3%	9.2%	36.90	Dar Alarkan Real Estate Development Co.	13.80	-4.3%	18.4%	99.84
Saudi Paper Manufacturing Co.	27.90	3.3%	20.2%	45.77	Mobile Telecommunication Company Saudi Arabia	10.80	-3.9%	7.4%	63.60
Mouwasset Medical Services Co.	198.00	3.2%	-5.3%	25.89	Middle East Paper Co.	30.85	-3.6%	-5.8%	15.72
Saudi Company for Hardware	29.80	3.1%	9.6%	6.44	Wafrah for Industry and Development Co.	32.75	-3.4%	27.9%	38.07
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.	46.40	46.40	0.0%	6.68	Al Alamiya for Coop Insurance Co.	12.50	12.50	0.0%	0.74
Alamar Foods Co.	151.00	151.00	0.0%	4.86	Alkhabeer REIT Fund	6.80	6.80	0.0%	1.08
Nahdi Medical Co.	183.00	183.00	0.0%	23.17	Allied Cooperative Insurance Group	10.80	10.80	0.0%	0.88
Elm Co.	397.00	397.00	0.0%	50.93	Amana Cooperative Insurance Co.	9.76	9.76	0.0%	4.43
Saudi Tadawul Group Holding Co.	141.00	141.00	0.0%	74.86	CHUBB Arabia Coop Insurance Co.	17.04	17.04	0.0%	1.04

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	19571.00	11.7%	11.1%	155785.16	MTN Group Ltd	12624.00	-10.7%	-0.8%	181911.84
AngloGold Ashanti Ltd	35867.00	9.9%	8.9%	162836.18	Absa Group Ltd	17519.00	-6.6%	-9.6%	139976.81
Northam Platinum Holdings Ltd	15663.59	6.2%	-16.3%	31640.45	Investec	10465.00	-5.4%	-2.8%	15906.80
Impala Platinum Holdings Ltd	17982.00	5.2%	-15.6%	94225.68	Investec Ltd	10343.00	-5.2%	-3.8%	10653.29
Anglo American Platinum Ltd	102108.00	3.4%	-28.3%	55787.73	Mr Price Group Ltd	13862.00	-4.6%	-12.8%	17881.98
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)
NEPI Rockcastle NV	11189.00	11300.00	-1.0%	19804.53	Mr Price Group Ltd	13862.00	13862.00	0.0%	17881.98
Bidvest Group Ltd	26377.00	26979.00	-2.2%	53281.54	Clicks Group Ltd	26111.00	25757.00	1.4%	23401.46
Bid Corp Ltd	39590.00	40961.00	-3.3%	43153.10	Vodacom Group Ltd	12558.00	11562.00	8.6%	22353.24
Woolworths Holdings Ltd	6714.00	8047.00	-16.6%	38202.66	British American Tobacco	67169.00	58585.00	14.7%	79931.11
Absa Group Ltd	17519.00	21100.00	-17.0%	139976.81	MultiChoice Group	13958.00	10925.00	27.8%	11752.64

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Prosperity	19400.00	6.0%	8.4%	788.750,10	Sai Gon Thuong Tin Commercial	25000.00	-3.9%	11.1%	750.933,27
Vinhomes	44750.00	4.4%	-6.8%	142.252,87	Bank for Inv. and Devp	46250.00	-1.9%	19.8%	43.451,12
Vincom Retail	29100.00	3.9%	10.6%	119.195,72	Asia Commercial JS Bank	24500.00	-1.6%	11.9%	98.889,28
No Va Land Invest	11000.00	3.3%	-21.4%	162.200,88	Military Commercial Bank	17500.00	-1.4%	2.3%	149.154,80
PetroVietnam Power Corp	13150.00	1.5%	23.5%	181.009,57	Viet Nam International Commercial Joint Stock Bank	20700.00	-1.2%	8.9%	63.629,51
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	91500.00	96000.00	-4.7%	69.436,39	Vietnam Rubber Group	14950.00	14950.00	0.0%	38.842,00
Saigon Beer Alcohol Beverage Corp.	187000.00	197900.00	-5.5%	65.940,44	Mobile World Inv. Corp	39400.00	39400.00	0.0%	53.562,68
Bank for Inv. and Devp	46250.00	49950.00	-7.4%	43.451,12	No Va Land Invest	11000.00	11000.00	0.0%	162.200,88
Vinamilk	76900.00	87004.15	-11.6%	140.409,90	Phat Dat Real Estate Development Corp	11800.00	11800.00	0.0%	37.713,72
Asia Commercial JS Bank	24500.00	29080.00	-15.7%	98.889,28	Vinhomes	44750.00	44750.00	0.0%	142.252,87

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