

# Daily Market Report

## 21 March 2023

### JSE

JSE All-Share Index surged by 2.40% and closed at 74,271.06 points on Monday, as the Industrial and Energy sectors recorded gains.

### BRVM

BRVM composite Index declined by 0.67% and closed at 204.71 points on Monday, with Servair Abidjan Côte d'Ivoire and Safca Côte d'Ivoire being the top losers.

### NSE

NGX All-Share Index inched down by 0.05% to close at 54,886.04 points on Monday, as the Insurance and Consumer Goods sectors recorded losses.

### EGX

EGX 30 Index climbed by 1.65% and closed at 14,923.81 points on Monday, as the market gained LE 16.15 billion of marker cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index was up by 0.14% to close at 790.56 points on Monday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	2.40%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.67%
<b>NGX</b> Nigerian Stock Exchange	▼	0.05%
<b>EGX</b> Egyptian Stock Exchange	▲	1.65%
<b>ESG</b> Casablanca Stock Exchange	▲	0.14%

### African Markets

**Nigeria:** NGX 30 Index marginally decreased by 0.01% to close at 1960.56 points on Monday. Stanbic IBTC and FCMB were the top losers.

**Egypt:** EGX 30 Index climbed by 1.65% and closed at 14,923.81 points on Monday, as the market gained LE 16.15 billion of marker cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index decreased by 0.51% and closed at 1,522.34 points on Monday. Diamond Trust Bank Limited and Bamburi Cement Limited were the top losers.

**South Africa:** JSE Top 40 Index surged by 2.68% and closed at 68,799.28 points on Monday, as the Industrial and Energy sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.89
<b>INTERBANK RATES</b>	
OPR	12.25 ▼
Overnight	12.70 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX Index declined by 1.09% to close at 9,545.34 points on Monday, as losses in the Utilities, Financials and Industrials sectors pushed shares lower. MSCI UAE jumped by 1.03% to close at 379.22 points.

**Vietnam:** VN-30 Index increased by 0.34% to close at 1,028.03 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam fell by 2.11% to close at 612.17 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.59% to close at 10,218.12 points on Monday, as gains in the Consumer Services, Media and Entertainment and Banks sectors led shares higher. MSCI Saudi Arabia increased by 0.69% and closed at 1,386.65 points.

**India:** Nifty 50 Index declined by 0.65% to close at 16,988.40 points on Monday, as losses in the Metal, IT and Financial Services sectors pushed shares lower. MSCI India declined by 0.67% to close at 1,885.10 points.

### News

#### Nigeria:

Nigeria's Oil Rigs Count Stagnates, Despite Feb Production Growth  
Nigeria, Japan trade hits \$10b  
FCMB Group issues N20.68bn bond

#### Kenya:

Ruto tweaks Uhuru budget, grows recurrent by Sh87.6bn  
Centum trades 4.9m units as stock buyback continues  
Kenya Power renegotiates Sh6bn dollar loans

#### Abu Dhabi:

Law on RAK's free zone for virtual asset firms passed  
UAE announces crypto freezone  
ADGM's assets under management up 56% in 2022

#### Saudi Arabia:

Aramco, DHL form new procurement and logistics hub JV  
GAMI launches new platform to boost investment in defense sector  
Saudi Arabia issues 46 mining licenses in Jan

#### Egypt:

Egypt approves LE 65B additional allocation in 22/23 general budget  
Foreign investments in local treasury bills rose to \$315.25B in Jan  
Net domestic assets of banks in Egypt hikes LE 910.5B in 6 months

#### South Africa:

Afrimat moves to mining sector on JSE  
Lighthouse Properties increases dividend as it returns to profit  
Interim profit of Jubilee halves as it deals with issues in SA & Zambia

#### India:

PSU banks' gross NPA declines to 5.53%  
India plans to extend fuel export curbs beyond March  
India to splurge \$12 billion on airports as travel rebounds

#### Vietnam:

Da Nang revives FDI inflow  
Vietnam, South Africa explore cooperation potential  
MoMo, Western Union partner for money transfer in Vietnam

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,545.34	-1.1%	-1.1%	-3.0%	-6.5%	AED/USD	3.67	0.0%	0.0%
Egypt	14,923.81	1.7%	1.5%	-12.2%	2.2%	EGP/USD	30.90	1.4%	25.1%
India	16,988.40	-0.7%	-0.7%	-1.8%	-6.2%	INR/USD	82.62	0.1%	-0.2%
Kenya	1,522.34	-0.5%	-0.5%	-7.5%	-9.2%	KES/USD	130.00	2.2%	5.3%
Nigeria	1,960.56	-0.01%	-0.01%	-1.8%	6.4%	NGN/USD	460.39	0.0%	2.7%
Saudi Arabia	10,218.12	0.6%	2.4%	1.1%	-2.5%	SAR/USD	3.76	0.0%	-0.1%
South Africa	68,799.28	2.7%	2.7%	-4.2%	2.8%	ZAR/USD	18.54	-1.3%	8.9%
Vietnam	1,028.03	0.3%	0.3%	1.3%	2.3%	VND/USD	23,585.00	0.0%	-0.2%

## MSCI Emerging Markets

MSCI Frontier	470.88	-0.6%	-0.6%	-2.2%	-0.3%	Brent Crude (\$)	73.79	1.1%	-14.1%
MSCI Frontier 100	1,074.36	-0.7%	-0.7%	-2.8%	-1.5%	Gold (\$)	1,999.70	0.5%	9.5%
MSCI Emerging	942.98	-0.9%	-0.9%	-2.2%	-1.4%	Copper (\$)	8,697.50	1.4%	3.9%
MSCI World (USD)	2,656.19	0.8%	0.8%	-2.2%	2.1%	Coffee (\$)	168.56	-1.9%	7.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Access	9.00	7.1%	5.9%	114.37	Stanbic IBTC	36.50	-8.5%	9.1%	48.00
Custodian	6.10	5.2%	2.5%	4.66	FCMB	4.06	-3.6%	5.5%	5.80
FBNH	10.95	2.3%	0.5%	29.43	Nigerian Breweries	38.55	-3.1%	-6.0%	29.31
Wema	4.05	1.3%	3.8%	2.21	Cap	19.00	-1.0%	6.7%	4.64
Lafarge Africa	25.40	1.2%	5.8%	86.08	Fidelity	5.15	-0.8%	18.4%	7.59
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	4.06	4.06	0.0%	5.80	Cap	19.00	15.25	24.6%	4.64
Wema	4.05	4.05	0.0%	2.21	Sterling	1.50	1.13	32.7%	2.36
Total	218.80	218.80	0.0%	74.80	Unilever	14.00	10.50	33.3%	1.65
Seplat Petroleum	1200.00	1200.00	0.0%	3.29	Custodian	6.10	4.55	34.1%	4.66
P Z Cussons	10.80	10.80	0.0%	3.66	Nascon	12.20	9.00	35.6%	0.81

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Hayah Insurance Company	0.84	9.0%	-13.5%	0.00	GHITHA HOLDING	68.80	-10.0%	-5.8%	7.30
Ras Al Khaimah Poultry & Feeding Co.	2.26	7.1%	40.4%	0.00	National Marine Dredging Co.	33.00	-5.3%	34.8%	36.81
ESG EMIRATES STALLIONS GROUP	5.37	4.9%	-30.8%	9.59	The National Bank of Ras Al Khaimah	4.85	-4.9%	3.2%	0.00
Gulf Pharmaceutical Industries	0.99	3.0%	-14.7%	0.14	Sudatel Telecom Group Co Ltd	0.38	-3.8%	-17.4%	0.07
Emirates Telecom. Group Company	23.40	2.7%	2.4%	14.73	Q Holding PSC	2.41	-3.6%	-39.8%	4.15
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 P.J.S.C	4.07	4.07	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 P.J.S.C	6.70	6.70	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Union Insurance Company	0.50	0.50	0.0%	0.00
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	United Fidelity Insurance Company (P.S.C)	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£)
Cleopatra Hospital Company	4.31	7.0%	-19.0%	7.56	Cairo For Investment And Real Estate Development	11.33	-1.4%	-12.8%	1.30
Oriental Weavers	10.79	6.8%	3.7%	5.34	Credit Agricole Egypt	8.57	-1.3%	1.3%	5.64
QALA For Financial Investments	1.68	6.1%	-19.4%	43.46	Taaleem Management Services	3.41	-1.2%	-14.8%	2.23
Ibsina Pharma	1.31	6.1%	-39.3%	6.26	Egyptian Kuwaiti Holding-EGP	34.93	-0.2%	10.8%	17.32
E-finance For Digital and Financial Investments	15.57	6.1%	-18.1%	13.23	Abou Kir Fertilizers	39.36	-0.2%	1.1%	1.72
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	22.00	22.00	0.0%	71.28	Housing & Development Bank	7.71	7.71	0.0%	47.56
Sidi Kerir Petrochemicals	14.95	14.95	0.0%	31.20	Ibsina Pharma	1.31	1.10	19.1%	6.26
Oriental Weavers	10.79	10.79	0.0%	5.34	Cairo For Investment And Real Estate Development	11.33	9.51	19.1%	1.30
Orascom Construction PLC	87.53	87.53	0.0%	4.55	Taaleem Management Services	3.41	2.72	25.4%	2.23
Misir Fertilizers Production Company	138.49	138.49	0.0%	8.87	Tenth Of Ramadan Pharma Ind. & Diagnostics	2.05	1.62	26.5%	14.91

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2508.90	2.5%	-2.0%	3871.675	Bajaj Finserv	1246.95	-4.2%	-19.4%	4974.72
Bharat Petroleum	359.20	2.2%	8.7%	3305.78	Adani Enterprises Limited	1812.00	-3.4%	-53.0%	9332.42
ITC	378.75	0.9%	14.2%	3801.08	Bajaj Finance	5562.00	-3.0%	-15.4%	9542.95
Grasim Industries	1594.85	0.6%	-7.5%	834.94	Hindalco Industries	386.25	-2.6%	-18.4%	2440.14
Kotak Mahindra Bank	1699.70	0.4%	-7.0%	7557.58	Tata Steel	104.50	-2.3%	-7.2%	4352.34
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	7235.80	7492.00	-3.4%	3741.06	Wipro	368.35	365.15	0.9%	1509.60
ITC	378.75	394.00	-3.9%	3801.08	Reliance Industries	2211.15	2180.00	1.4%	19769.97
NTPC	175.85	182.95	-3.9%	989.88	Cipla	867.00	853.85	1.5%	865.66
Dr Reddys Lab	4425.50	4645.00	-4.7%	3518.28	HDFC Life Insurance Company Ltd	465.50	457.80	1.7%	1819.83
Britannia Inds.	4335.00	4669.20	-7.2%	759.19	Tata Consumer products ltd.	703.45	686.60	2.5%	710.58

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom	17.95	9.8%	-25.7%	280.39	Diamond Trust Bank Limited	45.95	-5.2%	-8.1%	0.86
WPP Scangroup	2.99	6.4%	-0.7%	0.01	Bamburi Cement Ltd	26.75	-3.6%	-15.1%	0.05
Kengen Limited	2.20	0.5%	-31.7%	0.13	Kenya Power & Lighting Limited	1.40	-3.4%	-10.3%	1.94
Stanbic Holdings	111.00	0.5%	8.8%	0.04	NCBA Group Plc	32.95	-3.2%	-16.3%	0.13
The Cooperative Bank of Kenya Ltd	12.35	0.4%	0.4%	4.09	KCB Group	30.00	-3.2%	-21.3%	79.34
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%	46.33	Bamburi Cement Ltd	26.75	26.75	0.0%	0.05
Stanbic Holdings	111.00	114.00	-2.6%	0.04	Diamond Trust Bank Ltd	45.95	45.95	0.0%	0.86
Absa Bank Kenya	12.00	12.95	-7.3%	0.55	Equity Group Holdings Plc	38.00	38.00	0.0%	74.07
The Cooperative Bank of Kenya Ltd	12.35	14.00	-11.8%	4.09	KCB Group	30.00	30.00	0.0%	79.34
East African Breweries Limited	170.00	194.00	-12.4%	0.02	Kenya Reinsurance Corporation Ltd	1.54	1.54	0.0%	0.13

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Agricultural Marketing Co.	44.35	9.9%	157.8%	214.70	BinDawood Holding Co.	52.50	-3.0%	8.5%	10.71
Alinma Tokio Marine Co.	14.48	9.7%	20.7%	12.49	Nahdi Medical Co.	181.00	-2.5%	8.3%	40.16
Elm Co.	435.00	7.7%	31.0%	138.21	Gulf Insurance Group	28.00	-2.4%	13.8%	1.46
Dar Alarkan Real Estate Development Co.	14.32	6.1%	22.8%	114.41	Jabal Omar Development Co.	19.88	-2.4%	20.5%	70.82
East Pipes Integrated Company for Industry	47.05	4.6%	26.1%	9.04	United International Transportation Co.	55.30	-2.1%	21.1%	17.00
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.	48.80	48.80	0.0%	44.76	Al Alamiya for Coop Insurance Co.	12.00	12.00	0.0%	1.02
Alamar Foods Co.	152.20	152.20	0.0%	2.46	Alkhabeer REIT Fund	6.70	6.70	0.0%	0.67
Nahdi Medical Co.	181.00	181.00	0.0%	40.16	Allied Cooperative Insurance Group	10.72	10.72	0.0%	0.90
Elm Co.	435.00	435.00	0.0%	138.21	Amana Cooperative Insurance Co.	9.40	9.40	0.0%	3.38
Saudi Tadawul Group Holding Co.	138.80	138.80	0.0%	70.50	CHUBB Arabia Cooperative Insurance Co.	16.48	16.48	0.0%	1.19

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore	10255.00	7.2%	-10.1%	95679.15	MTN Group Ltd	12300.00	-2.4%	-3.4%	60393.00
Anglo American	59212.00	6.1%	-10.7%	129674.28	Vodacom Group Ltd	12215.00	-2.2%	-0.4%	14902.30
Northam Platinum Holdings Ltd	15247.00	5.6%	-18.5%	36745.27	Nedbank Group Ltd	20796.00	-1.9%	-2.2%	45751.20
Prosus NV	130890.00	5.3%	20.9%	178010.40	Old Mutual Ltd	1088.00	-1.3%	4.0%	8888.96
Cie Financiere Richemont SA	27372.00	5.1%	22.7%	109761.72	FirstRand Ltd	6091.00	-0.9%	-1.9%	93923.22
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)
Anheuser-Busch InBev SA/NV	111691.00	114457.00	-2.4%	42770.95	Clicks Group Ltd	25227.00	25227.00	0.0%	17997.19
Bidvest Group Ltd	25503.00	27230.00	-6.3%	13680.06	Mr Price Group Ltd	13523.00	13450.00	0.5%	11301.85
Bid Corp Ltd	38537.00	41225.00	-6.5%	29874.65	Sasol Ltd	23100.00	22610.00	2.2%	47586.00
Reinet Investments SCA	34994.00	38536.00	-9.2%	5540.95	Exxaro Resources Ltd	18453.00	17820.00	3.6%	13824.43
NEPI Rockcastle NV	10585.00	11925.00	-11.2%	15559.95	Anglo American Platinum Ltd	103984.00	94753.00	9.7%	30827.10

## Vietnam

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
					Tien Phong Commercial Joint Stock Bank	21600.00	-14.6%	2.6%	86.547,07
					Vietcombank	85100.00	-4.4%	6.4%	90.420,27
					PetroVietnam Power Corp	12850.00	-4.1%	20.7%	127.519,65
					Ho Chi Minh City Devp	17800.00	-3.8%	11.6%	51.919,35
					Vietnam Rubber Group	14350.00	-3.7%	4.0%	27.731,12
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)
Saigon Beer Alcohol Beverage Corp.	189000.00	197900.00	-4.5%	8.018,15	Vietnam Rubber Group JSC	14350.00	14350.00	0.0%	27.731,12
Bank for Inv. and Devp	45350.00	49950.00	-9.2%	26.684,68	Mobile World Inv. Corp	38100.00	38100.00	0.0%	88.365,83
Vietcombank	85100.00	96000.00	-11.4%	90.420,27	No Va Land Invest	11100.00	11100.00	0.0%	110.881,44
Vinamilk	74300.00	87004.15	-14.6%	119.751,67	Phat Dat Real Estate Development Corp	11800.00	11800.00	0.0%	53.199,13
Asia Commercial JS Bank	24000.00	29080.00	-17.5%	59.204,41	Vinhomes	42550.00	42550.00	0.0%	94.377,92

\*No gainers on 20/3

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