

Daily Market Report

30 March 2023

JSE

JSE All-Share Index increased by 0.57% and closed at 76,480.13 points on Wednesday, as the Resources and Financial sectors recorded gains.

BRVM

BRVM composite Index decreased by 0.21% and closed at 202.22 points on Wednesday, with Bollere Transport & Logistics and Ecobank Transnational Inc being the top losers.

NSE

NGX All-Share Index increased by 0.90% to close at 53,603.80 points on Wednesday, as the Industrials, Banking and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index surged by 3.17% and closed at 16,411.37 points on Wednesday, as the market gained LE 25.98 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index inched up by 0.06% to close at 799.02 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.57%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.21%
NGX Nigerian Stock Exchange	▲	0.90%
EGX Egyptian Stock Exchange	▲	3.17%
ESG Casablanca Stock Exchange	▲	0.06%

African Markets

Nigeria: NGX 30 Index rose by 1.02% to close at 1914.45 points on Wednesday. Dangote Cement and UBN were the top gainers.

Egypt: EGX 30 Index surged by 3.17% and closed at 16,411.37 points on Wednesday, as the market gained LE 25.98 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index jumped by 1.07% and closed at 1,598.10 points on Tuesday. Nairobi Securities Exchange and Total Kenya Ltd were the top gainers.

South Africa: JSE Top 40 Index increased by 0.60% and closed at 70,864.88 points on Wednesday, as the Resources and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.82
INTERBANK RATES	
OPR	18.50 ▲
Overnight	19.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.01% to close at 9,455.81 points on Wednesday, as losses in the Telecommunications and Utilities sectors pushed shares lower. MSCI UAE decreased by 0.33% to close at 377.31 points.

Vietnam: VN-30 Index increased by 0.25% to close at 1,061.45 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.38% to close at 633.76 points.

Saudi Arabia: Tadawul All Share Index increased by 0.34% to close at 10,503.18 points on Wednesday, as gains in the Consumer Durables & Apparel, Utilities, and Food & Staples Retailing sectors led shares higher. MSCI Saudi Arabia increased by 0.22% and closed at 1,420.05 points.

India: Nifty 50 Index increased by 0.76% to close at 17,080.70 points on Wednesday, as gains in the Metal, Media and Auto sectors led shares higher. MSCI India increased by 0.76% to close at 1,889.11 points.

News

Nigeria:

Maximum Lending Rate Reached 28.75% in February
Customs generates N54b revenue in three months
Shell Pays FG over \$4.5bn in Royalties, Taxes, Others to Nigeria

Kenya:

CBK signals costly loans after hiking rates to five-year high
Kenya's special economic zones get own power rate
Britam profit increases to Sh1.6bn on cost-cutting

Abu Dhabi:

UAE approves initiatives to double re-export industry
ADNOC L&S unveils logistics platform
Empower assembly approves Dh425 mn in dividends

Saudi Arabia:

Saudi banks' net profits surge 7.5% to \$1.4bn: SAMA
Saudi Ports Authority unveils plans to cut emissions by 1,046 tons
Al Rajhi Bank to issue first US dollar-denominated sukuk

Egypt:

Egypt to establish Mediterranean port, industrial zone in Gargoub
Greece's Mytilineos Holdings aims for investing in Egypt
Egypt secures \$2.6 bln in devpt finances for private sector in 2022

South Africa:

RCL Foods set to sell Vector Logistics for R1.25bn
Implats extends its takeover offer for RBPlat by yet another month
SA's biggest asset managers are now Level 1 BEE compliant

India:

Govt plans to borrow Rs 8.8 lakh crore in first half of FY2024
Sebi sets up Rs 33k-cr corpus for debt MFs hit by market turmoil
Russia's Rosneft signs deal to boost oil supplies to India

Vietnam:

Hanoi's consumer price index up 2.25% in Q1
Vietnam posts 3.32% GDP growth in Q1
Vietnam runs trade surplus of 4.07 bln USD in Q1

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,455.81	-0.01%	-0.5%	-4.0%	-7.4%	AED/USD	3.67	0.0%	0.0%
Egypt	16,411.37	3.2%	5.0%	-3.5%	12.4%	EGP/USD	30.81	-0.3%	24.7%
India	17,080.70	0.8%	0.8%	-1.3%	-5.7%	INR/USD	82.24	0.1%	-0.6%
Kenya	1,598.10	1.1%	2.2%	-2.9%	-4.7%	KES/USD	132.15	1.0%	7.0%
Nigeria	1,914.45	1.0%	-2.2%	-4.1%	3.9%	NGN/USD	460.00	-1.0%	2.7%
Saudi Arabia	10,503.18	0.3%	0.5%	4.0%	0.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	70,864.88	0.6%	2.4%	-1.3%	5.8%	ZAR/USD	18.10	-0.4%	6.3%
Vietnam	1,061.45	0.2%	1.0%	4.6%	5.6%	VND/USD	23,490.00	0.0%	-0.6%

MSCI Emerging Markets

MSCI Frontier	481.38	0.5%	1.3%	0.03%	1.9%	Brent Crude (\$)	78.28	-0.5%	-8.9%
MSCI Frontier 100	1,103.10	0.6%	1.5%	-0.2%	1.1%	Gold (\$)	1,966.90	-0.3%	7.7%
MSCI Emerging	980.14	1.0%	0.8%	1.7%	2.5%	Copper (\$)	9,002.50	0.3%	7.5%
MSCI World (USD)	2,739.42	1.3%	1.7%	0.9%	5.3%	Coffee (\$)	166.69	-0.4%	6.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.50	7.1%	32.7%	134.24	Cap	17.90	-5.8%	0.6%	13.05
Dangote Cement	290.00	5.1%	11.1%	60.90	MTNN	220.40	-1.2%	2.5%	549.66
UBN	7.05	4.4%	10.2%	1.18	United Capital PLC	11.55	-0.4%	-17.5%	45.95
P Z Cussons	11.90	4.4%	4.8%	13.22					
Access	8.95	2.9%	5.3%	26.64					
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	4.10	4.10	0.0%	1.58	Cap	17.90	15.25	17.4%	13.05
Wema	4.00	4.00	0.0%	0.51	Unilever	14.00	10.50	33.3%	1.68
Transnational Corporation	1.50	1.50	0.0%	134.24	Custodian	6.15	4.55	35.2%	14.75
Total	218.80	218.80	0.0%	102.74	Nascon	12.45	9.00	38.3%	5.47
Seplat Petroleum	1150.00	1150.00	0.0%	234.49	Guaranty	25.20	18.00	40.0%	551.45

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Q Holding PSC	2.68	14.0%	-33.0%	42.95	Emirates Driving Co.	25.30	-3.7%	-4.9%	0.47
APEX INVESTMENT P.S.C	2.07	9.5%	-40.9%	8.48	Emirates Telecom. Group Company	22.66	-2.8%	-0.9%	72.14
Abu Dhabi National Co. for Building Materials	0.16	6.1%	-14.8%	0.00	Methaq Takaful Insurance Compnay	0.57	-2.6%	-10.4%	0.06
The National Bank of Ras Al Khaimah	5.00	5.0%	6.4%	0.05	National Corp for Tourism & Hotels	2.64	-1.9%	-12.0%	0.38
Invictus Investment Company PLC	3.20	4.6%	-16.2%	7.92	Bank of Sharjah	0.37	-1.9%	-22.9%	0.03
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 Co.	210.00	210.00	0.0%	0.00	Bayanat AI PLC	0.00	0.00	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Emirates Telecom. Group Company	22.66	22.66	0.0%	72.14
Invest Bank	0.45	0.45	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	Sawaeed Holding	6.70	6.70	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-EGP	44.00	10.0%	39.6%	59.17	Edita Food Industries S.A.E	14.54	-1.4%	4.7%	1.36
Oriental Weavers	13.29	8.4%	27.8%	48.90	T M G Holding	8.67	-0.8%	-13.2%	13.32
Telecom Egypt	24.50	7.4%	-2.4%	87.72	Cairo For Investment And Real Estate Development	10.71	-0.5%	-17.6%	1.54
Alexandria Mineral Oils Company	9.38	7.3%	48.4%	71.65					
Abu Dhabi Islamic Bank- Egypt	18.67	7.3%	3.9%	32.31					
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	24.50	24.50	0.0%	87.72	Housing & Development Bank	9.15	9.15	0.0%	57.11
Sidi Kerir Petrochemicals -SIDPEC	21.50	21.50	0.0%	109.06	Cleopatra Hospital Co.	4.39	3.81	15.2%	5.31
Oriental Weavers	13.29	13.29	0.0%	48.90	Taaleem Management Services	3.38	2.72	24.3%	1.84
Orascom Construction PLC	96.20	96.20	0.0%	3.21	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.04	1.62	25.9%	5.55
Misr Fertilizers Production Co.	163.51	163.51	0.0%	19.54	Ibnsina Pharma	1.40	1.10	27.0%	1.57

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	1749.50	9.3%	-54.7%	15795.971	UPL	709.00	-0.8%	-1.0%	2028.94
Adani Ports And Sez.	636.05	7.2%	-22.3%	10609.05	Bharti Airtel	745.00	-0.5%	-7.6%	3640.87
Hero Motocorp	2314.00	2.9%	-15.5%	1632.13	Asian Paints	2775.00	-0.3%	-10.1%	3013.96
Eicher Motors	2931.00	2.8%	-9.2%	2228.93	Reliance Industries	2242.20	-0.3%	-12.0%	19340.21
Hcl Technologies	1069.35	2.7%	2.9%	2620.55	Cipla	888.50	-0.1%	-17.4%	2709.13
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	7548.70	7600.00	-0.7%	3349.49	Wipro	359.55	355.00	1.3%	1576.47
Dr Reddys Lab	4565.05	4645.00	-1.7%	1898.44	Tata Consumer products ltd.	698.00	686.60	1.7%	811.20
ITC	383.05	394.00	-2.8%	3872.20	Infosys	1388.60	1355.00	2.5%	12139.56
NTPC	175.25	182.95	-4.2%	3514.77	Reliance Industries	2242.20	2180.00	2.9%	19340.21
Bajaj Auto	3865.00	4131.75	-6.5%	1655.78	Divi's Laboratories Ltd	2840.00	2730.00	4.0%	1041.95

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	6.46	7.3%	-4.7%	0.05	WPP Scangroup	2.84	-5.0%	-5.6%	0.04
Total Kenya Ltd	22.00	4.8%	-7.8%	0.10	NCBA Group	35.00	-2.9%	-11.1%	1.26
Kenya Reinsurance Corp Ltd	1.80	4.7%	-1.6%	0.45	Kengen Limited	2.17	-0.9%	-32.6%	0.20
Equity Group Holdings Plc	44.25	3.8%	-0.6%	239.48					
Nation Media Group	15.45	3.0%	-3.1%	0.04					
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	168.50	169.75	-0.7%	0.96	Kengen Limited	2.17	2.15	0.9%	0.20
Stanbic Holdings	108.50	114.00	-4.8%	0.55	WPP Scangroup Plc	2.84	2.80	1.4%	0.04
Absa Bank Kenya	12.20	12.95	-5.8%	0.64	Bamburi Cement Ltd	28.00	26.75	4.7%	0.13
The Cooperative Bank of Kenya Ltd	12.85	14.00	-8.2%	1.55	Centum Investment Company	8.50	8.00	6.3%	0.15
East African Breweries Limited	174.50	194.00	-10.1%	1.08	Nairobi Securities Exchange Plc	6.46	6.02	7.3%	0.05

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arabian Pipes Co.	45.65	10.0%	14.1%	35.01	National Agricultural Marketing Co.	41.30	-6.7%	140.1%	179.17
Al Kathiri Holding Co.	65.20	10.0%	83.4%	46.99	National Medical Care Co.	89.00	-3.8%	20.4%	42.79
Al Hassan Ghazi Ibrahim Shaker Co.	19.74	6.2%	3.2%	105.81	Seera Group Holding	21.80	-3.0%	25.1%	66.93
Middle East Healthcare Co.	37.75	5.2%	48.3%	71.17	Electrical Industries Co.	33.35	-2.8%	41.9%	19.55
Dallah Healthcare Co.	154.00	5.1%	4.1%	45.34	Saudi Industrial Development Co.	11.50	-2.5%	11.2%	11.83
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.	51.50	51.50	0.0%	10.32	Al Alamiya for Coop Insurance Co.	12.10	12.10	0.0%	1.23
Alamar Foods Co.	143.40	143.40	0.0%	11.56	Alkabeer REIT Fund	6.65	6.65	0.0%	2.59
Nahdi Medical Co.	179.80	179.80	0.0%	31.11	Allied Cooperative Insurance Group	10.90	10.90	0.0%	0.66
Scientific and Medical Equipment House Co.	70.20	70.20	0.0%	15.50	Amana Cooperative Insurance Co.	9.60	9.60	0.0%	5.61
Elm Co.	436.60	436.60	0.0%	58.01	CHUBB Arabia Coop Insurance Co.	16.94	16.94	0.0%	1.52

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Exxaro Resources Ltd	18826.00	2.7%	-13.4%	19955.56	Mondi	28168.00	-4.5%	-3.2%	12758.70
Anheuser-Busch InBev SA/NV	117315.00	2.3%	14.6%	56466.06	Anglo American Platinum Ltd	100500.00	-2.4%	-29.5%	20949.23
Investec	10017.00	2.2%	-7.0%	14023.80	FirstRand Ltd	6075.00	-2.4%	-2.2%	170282.25
Prosus NV	139529.00	2.2%	20.9%	110251.63	Bidvest Group Ltd	25778.00	-2.0%	20.2%	38151.44
Naspers Ltd	333917.00	2.1%	18.2%	157568.75	MultiChoice Group	12254.00	-1.7%	4.5%	10359.04
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	117315.00	117315.00	0.0%	56466.06	Clicks Group Ltd	25721.00	25227.00	2.0%	17791.73
Reinet Investments SCA	37551.00	38536.00	-2.6%	8881.94	Exxaro Resources Ltd	18826.00	17820.00	5.6%	19955.56
Bid Corp Ltd	40111.00	41225.00	-2.7%	33773.46	Anglo American Platinum Ltd	100500.00	94753.00	6.1%	20949.23
Bidvest Group Ltd	25778.00	27230.00	-5.3%	38151.44	Mr Price Group Ltd	14563.00	13450.00	8.3%	15291.15
NEPI Rockcastle NV	10258.00	11925.00	-14.0%	18156.66	Sasol Ltd	24700.00	22610.00	9.2%	35074.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Military Commercial Bank	18300.00	1.7%	7.0%	190.466,86	Mobile World Inv. Corp	38700.00	-1.0%	-9.8%	71.350,05
Techcombank	28000.00	1.6%	8.3%	160.517,25	Petrovietnam Gas	102800.00	-0.9%	1.3%	10.215,14
Masan Group Corp	78800.00	1.6%	-15.3%	91.278,27	Vietnam Prosperity	20900.00	-0.5%	16.8%	344.451,43
Saigon Securities Inc	21050.00	1.2%	18.9%	331.190,30	No Va Land Invest	12550.00	-0.4%	-10.4%	134.486,59
Vinamilk	74900.00	0.7%	-1.6%	67.625,68	Phat Dat Real Estate Development Corp	12400.00	-0.4%	-8.8%	43.822,82
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	92300.00	96000.00	-3.9%	38.842,61	Vietnam Rubber Group	14750.00	14750.00	0.0%	18.220,14
Saigon Beer Alcohol Beverage Corp.	185400.00	197900.00	-6.3%	11.078,81	Mobile World Inv. Corp	38700.00	38700.00	0.0%	71.350,05
Bank for Inv. and Devp	46200.00	49950.00	-7.5%	13.929,83	No Va Land Invest	12550.00	12550.00	0.0%	134.486,59
Vinamilk	74900.00	87004.15	-13.9%	67.625,68	Phat Dat Real Estate Development Corp	12400.00	12400.00	0.0%	43.822,82
Asia Commercial JS Bank	24400.00	29080.00	-16.1%	370.774,58	Vingroup JSC	53500.00	53000.00	0.9%	31.210,91

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