

Daily Market Report

6 March 2023

JSE

JSE All-Share Index increased by 0.96% and closed at 78,293.01 points on Friday, as the Materials and Energy sectors recorded gains.

BRVM

BRVM composite Index was up by 0.15% and closed at 206.18 points on Friday, with Setao Côte d'Ivoire and Sicable Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index decreased by 0.25% to close at 55,529.21 points on Friday, as the Oil & Gas and Insurance sectors recorded losses.

EGX

EGX 30 Index was down by 0.11% and closed at 16,827.65 points on Sunday, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.67% to close at 810.59 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.96%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.15%
NGX Nigerian Stock Exchange	▼	0.25%
EGX Egyptian Stock Exchange	▼	0.11%
ESG Casablanca Stock Exchange	▼	0.67%

African Markets

Nigeria: NGX 30 Index decreased by 0.25% to close at 1,979.70 points on Friday. Seplat and FCMB were the top losers.

Egypt: EGX 30 Index was down by 0.11% and closed at 16,827.65 points on Sunday, amid Arab and foreign selling.

Kenya: NSE 20 Index inched up by 0.08% and closed at 1,634.09 points on Friday. Nation Media Group and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index increased by 1.01% and closed at 72,318.71 points on Friday, as the Materials and Energy sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 460.96
INTERBANK RATES	
OPR	12.13 ▲
Overnight	12.43 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.39% to close at 9,906.71 points on Friday, as gains in the Healthcare, Financials and Consumer Discretionary sectors led shares higher. MSCI UAE decreased by 0.38% to close at 400.08 points.

Vietnam: VN-30 Index dropped by 1.50% to close at 1,013.35 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.24% to close at 604.52 points.

Saudi Arabia: Tadawul All Share Index climbed by 1.30% to close at 10,411.26 points on Sunday, as gains in the Commercial & Professional Services, Healthcare and Retail sectors led shares higher. MSCI Saudi Arabia remained unchanged at 1,397.62 points.

India: Nifty 50 Index rose by 1.57% to close at 17,594.35 points on Friday, as all the sectors recorded gains. MSCI India climbed by 1.25% to close at 1,940.36 points.

News

Nigeria:

Banks' credit to govt rises by N11tn – Report
FG disburses N309bn grant to exporting firms
CBN releases N114bn under 100-for-100 policy

Kenya:

America lists trade deal with Kenya on its 2023 agenda
Foreign investor stock sales ease in February
Private varities set for windfall in new funding policy

Abu Dhabi:

UAE and Turkey sign \$40bn trade deal
Eni agrees deal with UAE's ADNOC as Italy rebuilds relationship
UAE's ADNOC prices gas business IPO near top of range

Saudi Arabia:

Saudi non-oil business activity surges as PMI hits 8-year high
Saudi Arabia, Monaco establish diplomatic relations
Saudi PIF raises stake in Japanese film co Toei to 6%

Egypt:

Egypt's PMI hits 46.9 in February
Egypt's foreign reserves increase \$128M by end of February
FRA shortens time required to increase capital of EGX-listed cos

South Africa:

South African business activity stabilises in February - PMI
Implats reports lower interim profit after power cuts, furnace rebuild
RMB ramps up its exposure to renewable energy projects

India:

Russian oil imports jump to new high of 16L barrels/day
Foxconn announces \$700 mn Apple manufacturing in Karnataka
Services sector activity at 12-year high in Feb on rising business

Vietnam:

Vietnam enjoys trade surplus of over 2.8 bn USD in first two months
Central bank grants first credit growth quota for banks in 2023
HCM City foreign investment surges by 43.1% in first 2 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,906.71	0.4%	0.0%	0.6%	-3.0%	AED/USD	3.67	0.0%	0.0%
Egypt	16,827.65	-0.1%	-0.1%	-1.0%	15.3%	EGP/USD	30.72	-0.1%	24.4%
India	17,594.35	1.6%	0.0%	1.7%	-2.8%	INR/USD	81.71	-0.8%	-1.3%
Kenya	1,634.09	0.1%	0.0%	-0.8%	-2.5%	KES/USD	128.00	0.5%	3.6%
Nigeria	1,979.70	-0.2%	0.0%	-0.9%	7.4%	NGN/USD	461.00	0.2%	2.9%
Saudi Arabia	10,411.26	1.3%	1.3%	3.1%	-0.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	72,318.71	1.0%	0.0%	0.8%	8.0%	ZAR/USD	18.14	-0.3%	6.6%
Vietnam	1,013.35	-1.5%	0.0%	-0.2%	0.8%	VND/USD	23,725.00	0.0%	0.4%

MSCI Emerging Markets

MSCI Frontier	480.14	-0.1%	0.0%	-0.2%	1.7%	Brent Crude (\$)	85.83	1.3%	-0.1%
MSCI Frontier 100	1,103.18	0.1%	0.0%	-0.2%	1.2%	Gold (\$)	1,854.60	0.8%	1.6%
MSCI Emerging	988.03	0.8%	0.0%	2.5%	3.3%	Copper (\$)	8,983.50	0.3%	7.3%
MSCI World (USD)	2,757.97	1.4%	0.0%	1.6%	6.0%	Coffee (\$)	175.08	-0.5%	12.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Flour Mills	33.50	4.7%	18.0%	50.65	Seplat Petroleum	1200.00	-9.4%	9.1%	418.88
Unilever	13.80	2.2%	19.0%	5.89	FCMB	4.30	-4.0%	11.7%	2.70
P Z Cussons	10.75	0.9%	-5.3%	7.54	Sterling	1.50	-3.2%	7.1%	68.99
Transnational Corporation	1.28	0.8%	13.3%	14.31	UBA	8.60	-1.1%	13.2%	59.99
Zenith	26.60	0.8%	10.8%	461.81	Dangote Sugar	19.20	-0.8%	19.6%	109.14
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	4.30	4.30	0.0%	2.70	Custodian	5.90	4.55	29.7%	2.26
Wema	4.35	4.35	0.0%	0.26	Unilever	13.80	10.50	31.4%	5.89
Total	218.80	218.80	0.0%	15.89	Cap	20.20	15.25	32.5%	5.20
Seplat Petroleum	1200.00	1200.00	0.0%	418.88	Sterling	1.50	1.13	32.7%	68.99
P Z Cussons	10.75	10.75	0.0%	7.54	Nascon	12.20	9.00	35.6%	11.73

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
The National Bank of Ras Al Khaimah	5.10	5.2%	8.5%	0.01	National Corp for Tourism & Hotels	2.60	-3.7%	-13.3%	0.08
RAK Co. for White Cement & Construction Materials	1.50	4.2%	-16.2%	0.01	ESG Emirates Stallions Group	6.70	-2.2%	-13.7%	11.42
Foodco National Foodstuff	3.09	3.7%	22.6%	0.00	Arkan Building Materials Co	1.46	-1.4%	-8.2%	8.52
Sudatel Telecommunications Group Company Limited	0.46	3.1%	0.0%	0.01	Multiply Group	4.07	-1.2%	-12.3%	90.03
Abu Dhabi Ship Building Co.	4.13	3.0%	0.7%	2.67	PALMS SPORTS	9.90	-1.0%	1.0%	9.46
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	The National Investor PRJSC	0.45	0.45	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Sawaeed Holding P.J.S.C	6.70	6.70	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.00	0.0%	0.00	United Fidelity Insurance Co	1.60	1.60	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sharjah Insurance Company	1.50	1.50	0.0%	0.00
Ras Alkhaima National Insurance	4.50	4.50	0.0%	0.00	Invest Bank	0.45	0.00	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£)
Telecom Egypt	27.80	7.7%	10.8%	67.00	Medinet Nasr Housing	3.46	-2.3%	6.5%	12.14
Sidi Kerir Petrochemicals - SIDPEC	17.08	1.9%	30.2%	43.54	QALA For Financial Investments	2.21	-2.2%	6.3%	58.46
Abu Dhabi Islamic Bank-Egypt	19.80	1.0%	10.2%	7.85	GB AUTO	5.36	-1.8%	0.0%	32.63
Fawry For Banking Tech & Electronic Payment	5.45	0.6%	4.0%	59.66	T M G Holding	9.38	-1.8%	-6.1%	13.79
Abou Kir Fertilizers	41.09	0.3%	5.9%	18.61	Housing & Development Bank	9.20	-1.7%	-22.0%	2.76
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	27.80	27.80	0.0%	67.00	Housing & Development Bank	9.20	9.20	0.0%	73.19
Sidi Kerir Petrochemicals - SIDPEC	17.08	17.08	0.0%	43.54	Cairo For Investment & Real Estate Devpt	13.22	9.51	39.0%	0.01
Palm Hills Development Company	2.06	2.06	0.0%	9.06	Taaleem Mgt Services	3.90	2.72	43.4%	0.02
Oriental Weavers	11.02	11.02	0.0%	23.87	T M G Holding	9.38	6.50	44.3%	13.79
Orascom Construction PLC	93.06	93.06	0.0%	6.85	Tenth Of Ramadan Pharma Ind. & Diagnostic-Rameda	2.38	1.62	46.9%	1.48

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	1874.00	16.6%	-51.4%	41352.902	Tech Mahindra	1086.65	-2.1%	6.9%	2621.34
Adani Ports And Sez.	683.70	9.8%	-16.4%	28848.86	Ultratech Cement	7220.70	-0.9%	3.8%	2955.30
State Bank Of India	561.00	5.1%	-8.6%	15426.82	Cipla	878.75	-0.9%	-18.3%	1669.69
Bharti Airtel	764.40	3.3%	-5.2%	4360.45	Divi's Laboratories Limited	2852.00	-0.3%	-16.4%	645.79
SBI Life Insurance	1131.00	2.8%	-8.1%	1033.20	Nestle India Limited	18440.00	-0.23%	-5.9%	849.98
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	385.30	394.00	-2.2%	3127.49	Cipla	878.75	877.00	0.2%	1669.69
Ultratech Cement	7220.70	7492.00	-3.6%	2955.30	HDFC Life Insurance Company	490.15	473.70	3.5%	1458.21
Dr Reddys Lab	4434.50	4645.00	-4.5%	1212.35	Divi's Laboratories Limited	2852.00	2740.10	4.1%	645.79
NTPC	172.55	182.95	-5.7%	2246.96	Wipro	390.50	372.40	4.9%	857.72
Hdfc Bank	1615.25	1722.10	-6.2%	12068.11	Kotak Mahindra Bank	1751.95	1631.00	7.4%	6311.05

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	14.95	2.4%	-6.3%	0.02	Kenya Reinsurance Corporation Ltd	1.70	-3.4%	-7.1%	0.17
Nairobi Securities Exchange Plc	6.50	0.9%	-4.1%	0.07	Kengen Limited	2.38	-1.2%	-26.1%	0.26
British American Tobacco Kenya Ltd	453.75	0.8%	-1.4%	9.03	Equity Group Holdings Plc	45.15	-0.6%	1.5%	4.32
Diamond Trust Bank Limited	49.95	0.8%	-0.1%	7.51	Safaricom Plc	23.45	-0.2%	-2.9%	9.49
Total Kenya Ltd	22.15	0.7%	-7.1%	0.01					
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	162.75	164.00	-0.8%	0.28	Kengen Limited	2.38	2.38	0.0%	0.26
Absa Bank Kenya	12.40	12.95	-4.2%	131.04	Kenya Reinsurance Corporation Ltd	1.70	1.70	0.0%	0.17
NCBA Group Plc	37.05	40.00	-7.4%	0.27	Nairobi Securities Exchange Plc	6.50	6.44	0.9%	0.07
The Cooperative Bank of Kenya Ltd	12.75	14.00	-8.9%	0.41	Bamburi Cement Limited	27.55	27.00	2.0%	0.14
East African Breweries Limited	175.25	194.00	-9.7%	3.49	Nation Media Group	14.95	14.55	2.7%	0.02

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.	20.80	9.9%	20.9%	0.45	The Company for Coop Insurance	92.60	-3.0%	15.0%	18.21
Arabian Pipes Co.	42.30	6.8%	5.7%	14.22	Elm Co.	372.40	-2.3%	12.2%	30.47
Al Kathiri Holding Co.	55.00	6.2%	54.7%	27.30	Etihad Atheeb Telecommunication	57.00	-1.9%	21.4%	15.10
National Medical Care Co.	83.50	4.6%	13.0%	57.29	Bawan Co.	29.85	-1.5%	1.7%	17.61
Naqi Water Co.	67.20	4.4%	2.3%	31.18	Saudia Dairy and Foodstuff Co.	242.00	-1.4%	12.0%	1.03
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.	46.30	46.30	0.0%	4.95	Al Alamiya for Coop Insurance Co.	12.80	12.80	0.0%	0.77
Alamar Foods Co.	154.00	154.00	0.0%	2.55	Alkhabeer REIT Fund	7.02	7.02	0.0%	0.48
Nahdi Medical Co.	174.00	174.00	0.0%	42.98	Allied Cooperative Insurance Group	11.00	11.00	0.0%	0.62
Elm Co.	372.40	372.40	0.0%	30.47	Amana Cooperative Insurance Co.	9.86	9.86	0.0%	2.77
Saudi Tadawul Group Holding Co.	144.00	144.00	0.0%	21.23	CHUBB Arabia Cooperative Insurance Co.	17.54	17.54	0.0%	1.03

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	11402.00	3.5%	0.0%	70350.34	MultiChoice Group	14448.00	-0.8%	23.2%	21816.48
BHP Group Ltd	59528.00	3.2%	13.0%	27931.73	Naspers Ltd	325916.00	-0.4%	15.4%	235989.26
Gold Fields Ltd	17264.00	3.2%	-2.0%	48339.20	Woolworths Holdings Ltd	7162.00	-0.4%	7.8%	30868.22
Northam Platinum Holdings Ltd	15189.00	2.9%	-18.9%	32048.79	Shoprite Holdings Ltd	22283.00	-0.4%	-1.4%	24511.30
Anglo American Platinum Ltd	101990.00	2.6%	-28.4%	37011.15	Absa Group Ltd	19860.00	-0.1%	2.4%	65538.00
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	40084.00	40220.00	-0.3%	33755.54	Mr Price Group Ltd	15131.00	15032.00	0.7%	5238.65
NEPI Rockcastle NV	11013.00	11299.00	-2.5%	17510.67	Clicks Group Ltd	26849.00	25757.00	4.2%	11910.22
Absa Group Ltd	19860.00	21100.00	-5.9%	65538.00	Vodacom Group Ltd	12827.00	11562.00	10.9%	18470.88
Bidvest Group Ltd/The	23402.00	24982.00	-6.3%	25040.14	British American Tobacco PLC	68421.00	58585.00	16.8%	43857.86
Woolworths Holdings Ltd	7162.00	8047.00	-11.0%	30868.22	MultiChoice Group	14448.00	10925.00	32.2%	21816.48

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam National Petroleum Group	38800.00	0.4%	22.4%	14369.13	Masan Group Corp	76000.00	-3.8%	-18.3%	45114.24
					PetroVietnam Power Corp	12350.00	-2.8%	16.0%	90771.88
					Vietcombank	90900.00	-2.5%	13.6%	73262.93
					Sai Gon Thuong Tin Commercial	25000.00	-2.3%	11.1%	299576.36
					Mobile World Inv. Corp	39400.00	-2.2%	-8.2%	73794.18
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	90900.00	96000.00	-5.3%	73262.93	Vietnam Rubber Group JSC	14100.00	14100.00	0.0%	15063.38
Saigon Beer Alcohol Beverage Corp.	187000.00	197900.00	-5.5%	17323.90	Mobile World Inv. Corp	39400.00	39400.00	0.0%	73794.18
Bank for Inv. and Devp	45900.00	49950.00	-8.1%	33739.47	No Va Land Invest	10350.00	10350.00	0.0%	73323.74
Vinamilk	76000.00	87004.15	-12.6%	53.548.84	Phat Dat Real Estate Development Corp	10500.00	10500.00	0.0%	34227.26
Asia Commercial JS Bank	24500.00	29080.00	-15.7%	59406.63	Vinhomes	40950.00	40950.00	0.0%	56647.56

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