

Daily Market Report

8 March 2023

JSE

JSE All-Share Index was down by 0.18% and closed at 78,556.54 points on Tuesday, as the Materials and Energy recorded losses.

BRVM

BRVM composite Index was up by 0.18% and closed at 207.10 points on Tuesday, with Bank of Africa - Côte d'Ivoire and CIE Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index inched down by 0.003% to close at 55,603.94 points on Tuesday, as the Banking, Oil & Gas and Consumer Goods sectors recorded losses.

EGX

EGX 30 Index fell by 2.21% and closed at 16,432.56 points on Tuesday, as the market lost LE 19.97 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index declined by 0.56% to close at 799.42 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.18%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.18%
NGX Nigerian Stock Exchange	▼	0.02%
EGX Egyptian Stock Exchange	▼	2.21%
ESG Casablanca Stock Exchange	▼	0.56%

African Markets

Nigeria: NGX 30 Index inched down by 0.01% to close at 1,981.98 points on Tuesday. FBNH and Sterling were the top losers.

Egypt: EGX 30 Index fell by 2.21% and closed at 16,432.56 points on Tuesday, as the market lost LE 19.97 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index declined by 0.94% and closed at 1,629.45 points on Tuesday. East African Breweries and Bamburi Cement Limited were the top losers.

South Africa: JSE Top 40 Index was down by 0.13% and closed at 72,675.31 points on Tuesday, as the Materials and Energy sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.82%
Exchange Rate	₦ 460.96
INTERBANK RATES	
OPR	10.50 ▼
Overnight	10.81 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.49% to close at 9,947.85 points on Tuesday, as losses in the Industrials, Real Estate, Financials and Real Estate sectors pushed shares lower. MSCI UAE declined by 1.05% to close at 399.55 points.

Vietnam: VN-30 Index increased by 0.94% to close at 1,025.11 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.81% to close at 615.47 points.

Saudi Arabia: Tadawul All Share Index increased by 0.24% to close at 10,473.32 points on Tuesday, as gains in the Consumer Services, Transportation and Telecommunication sectors led shares higher. MSCI Saudi Arabia increased by 0.31% and closed at 1,428.40 points.

India: Nifty 50 Index was closed on Tuesday on account of Holi.

News

Nigeria:

MTN Nigeria raises N125bn via commercial papers
TotalEnergies forecasts N3.5bn PAT for Q2
Lagos, Kano get lion's share as LGs share N2tn

Kenya:

5 Local Banks to Issue LOCs of KES 614.89 bn for Fuel Import
Centum pays Sh2.3bn debt using cash flows
Investors to lend and borrow shares directly

Abu Dhabi:

Mubadala to buy stake in US group Truist Insurance for \$1.95bn
UAE's Emirates Global Aluminium reports a 34% rise in 2022 net profit
National Marine Dredging Group inks deal with Abu Dhabi Chamber

Saudi Arabia:

Aramco signs \$6bn deal to help S. Korean cos win contracts
Saudi Shoura approves clean hydrogen energy deal with China
Saudi records 6% growth in SMEs amid growing startup ecosystem

Egypt:

Egypt to establish 15 logistic zones, dry ports to increase trade volume
Egypt's budget deficit hits LE 367.3B, primary surplus records LE25.5B
Taxes raise Egypt's revenues to LE 572.55B in 6 months

South Africa:

SA's GDP takes a knock in the fourth quarter
Nedbank announces R5bn share buyback and record dividend
Shoprite sees first-half sales top R100bn

India:

Adani repays Rs 7,374cr share-backed financing
Adani Power amalgamates six subsidiary companies
EV sales shoot up in February: FADA

Vietnam:

Feb exports provide positive signal in Binh Duong province
Aquaculture output grows 1.3% in two months
HCM City, Western Australia look to boost trade ties

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,947.85	-0.5%	0.4%	1.0%	-2.6%	AED/USD	3.67	0.0%	0.0%
Egypt	16,432.56	-2.2%	-2.5%	-3.3%	12.6%	EGP/USD	30.72	-0.3%	24.4%
India	17,711.45	0.0%	0.7%	2.4%	-2.2%	INR/USD	82.08	0.3%	-0.8%
Kenya	1,629.45	-0.9%	-0.3%	-1.0%	-2.8%	KES/USD	128.60	-0.3%	4.1%
Nigeria	1,981.98	-0.01%	0.1%	-0.8%	7.6%	NGN/USD	460.50	0.0%	2.8%
Saudi Arabia	10,473.32	0.2%	1.9%	3.7%	-0.05%	SAR/USD	3.75	0.0%	-0.1%
South Africa	72,675.31	-0.1%	0.5%	1.2%	8.5%	ZAR/USD	18.57	1.9%	9.1%
Vietnam	1,025.11	0.9%	1.2%	1.0%	2.0%	VND/USD	23,650.00	-0.1%	0.1%

MSCI Emerging Markets

MSCI Frontier	479.83	-0.4%	-0.1%	-0.3%	1.6%	Brent Crude (\$)	83.29	-3.4%	-3.0%
MSCI Frontier 100	1,104.12	-0.2%	0.1%	-0.1%	1.2%	Gold (\$)	1,820.00	-1.7%	-0.3%
MSCI Emerging	988.38	-0.5%	0.04%	2.5%	3.3%	Copper (\$)	8,763.50	-1.8%	4.7%
MSCI World (USD)	2,724.80	-1.4%	-1.2%	0.4%	4.7%	Coffee (\$)	173.04	0.4%	10.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	9.20	7.6%	-10.2%	13.79	FBNH	11.20	-2.6%	2.8%	19.76
Axamansard	2.09	4.5%	4.5%	4.88	Sterling	1.50	-2.6%	7.1%	6.01
FCMB	4.45	3.5%	15.6%	2.87	Custodian	5.70	-1.7%	-4.2%	2.08
Fidelity	5.20	1.2%	19.5%	52.52	UBA	8.55	-1.7%	12.5%	95.47
Dangote Cement	280.00	0.7%	7.3%	337.55	Access	9.15	-1.6%	7.6%	86.41
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	4.45	4.45	0.0%	2.87	Custodian	5.70	4.55	25.3%	2.08
Wema	4.30	4.30	0.0%	2.86	Unilever	13.80	10.50	31.4%	1.45
Total	218.80	218.80	0.0%	8.83	Cap	20.20	15.25	32.5%	3.95
Seplat Petroleum	1200.00	1200.00	0.0%	6.21	Sterling	1.50	1.13	32.7%	6.01
P Z Cussons	10.75	10.75	0.0%	4.54	Nascon	12.20	9.00	35.6%	3.85

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Bank of Sharjah	0.44	5.8%	-8.5%	2.28	FOODCO NATIONAL FOODSTUFF	2.79	-9.7%	10.7%	0.00
The National Bank of Ras Al Khaimah	5.00	2.5%	6.4%	3.00	Abu Dhabi National Co. for Building Materials	0.17	-9.2%	-8.2%	0.03
Americana Restaurants International	3.88	2.4%	30.6%	39.96	Sharjah Islamic Bank	1.93	-9.0%	-1.0%	6.89
Borouge	2.63	2.3%	4.0%	59.28	Hayah Insurance Co.	0.82	-6.8%	-15.5%	0.03
National Corp for Tourism & Hotels	2.64	1.5%	-12.0%	0.19	Aram Group	1.60	-6.4%	-28.3%	0.00
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	Q Holding	2.61	2.61	0.0%	8.50
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
National Bank of Fujairah	4.99	4.99	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	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£)
Ezz Steel	30.18	3.4%	29.8%	51.39	QALA For Financial Investments	2.10	-4.6%	1.0%	56.51
					Telecom Egypt	25.55	-4.5%	1.8%	81.80
					GB AUTO	5.12	-4.3%	-4.5%	23.58
					Edita Food Industries S.A.E	15.36	-3.9%	10.6%	0.65
					Housing & Development Bank	8.95	-3.9%	-24.4%	4.27
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	25.55	25.55	0.0%	81.80	Housing & Development Bank	8.95	8.95	0.0%	47.45
Sidi Kerir Petrochemicals	16.82	16.82	0.0%	31.51	Cleopatra Hospital Co.	5.20	3.81	36.5%	0.29
Oriental Weavers	11.10	11.10	0.0%	20.88	Cairo For Investment And Real Estate Development	13.00	9.51	36.7%	8.08
Orascom Construction	90.72	90.72	0.0%	5.02	Taaleem Management Services	3.90	2.72	43.4%	0.24
Misr Fertilizers Production Co.	143.22	143.22	0.0%	12.01	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.33	1.62	43.8%	5.43

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	1982.00	5.5%	-48.6%	54932.789	Britannia Inds.	4325.00	-2.0%	0.4%	2941.49
Tata Motors	440.50	2.9%	13.5%	4945.37	Tata Steel	105.85	-1.1%	-6.0%	11331.23
ONGC	158.20	2.6%	7.8%	2283.86	Jsw Steel	675.20	-1.0%	-12.1%	823.73
NTPC	176.65	2.4%	6.1%	2186.12	Hindalco Industries	414.50	-0.6%	-12.4%	2116.12
Power Grid Corp Of India	227.25	2.3%	6.3%	2667.75	Larsen & Toubro	2140.00	-0.6%	2.6%	3927.39
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	388.50	394.00	-1.4%	4165.31	Cipla	880.00	869.05	1.3%	3588.39
NTPC	176.65	182.95	-3.4%	2186.12	HDFC Life Insurance Company	490.00	473.70	3.4%	1483.15
Ultratech Cement	7214.95	7492.00	-3.7%	1115.87	Divi's Laboratories Limited	2848.45	2740.10	4.0%	561.93
Dr Reddys Lab	4440.00	4645.00	-4.4%	779.94	Wipro	393.30	372.40	5.6%	1328.39
Larsen & Toubro	2140.00	2297.65	-6.9%	3927.39	Kotak Mahindra Bank	1750.55	1631.00	7.3%	9086.06

*Market closed on 7/3

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	6.66	7.1%	-1.8%	0.64	East African Breweries Limited	174.50	-6.7%	4.2%	3.12
Absa Bank Kenya	12.50	0.4%	1.6%	4.28	Bamburi Cement Limited	28.15	-3.6%	-10.6%	0.19
Kenya Power & Lighting Limited	1.47	0.0%	-5.8%	0.58	British American Tobacco Kenya Ltd	450.25	-3.6%	-2.1%	18.24
Stanbic Holdings	106.00	0.0%	3.9%	0.11	Kengen Limited	2.32	-2.5%	-28.0%	1.48
Standard Chartered Bank Kenya Ltd	165.00	-0.2%	15.6%	6.19	Safaricom Plc	22.55	-2.0%	-6.6%	63.02
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	165.00	165.25	-0.2%	6.19	Kengen Limited	2.32	2.32	0.0%	1.48
Absa Bank Kenya	12.50	12.95	-3.5%	4.28	Nation Media Group	14.60	14.55	0.3%	0.00
Stanbic Holdings	106.00	114.00	-7.0%	0.11	Kenya Reinsurance Corporation Ltd	1.72	1.70	1.2%	0.06
NCBA Group Plc	36.65	40.00	-8.4%	0.36	Bamburi Cement Limited	28.15	27.00	4.3%	0.19
The Cooperative Bank of Kenya Ltd	12.60	14.00	-10.0%	14.39	WPP Scangroup Plc	2.95	2.80	5.4%	0.15

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.	25.15	9.9%	46.2%	32.26	Etihad Atheeb Telecommunication Co.	58.80	-6.2%	25.2%	169.57
National Company for Learning and Education	108.80	6.3%	59.3%	19.64	Al-Jouf Agricultural Development Co.	50.40	-4.0%	13.5%	21.44
Middle East Paper Co.	32.65	4.5%	-0.3%	59.41	Al Kathiri Holding Co.	52.60	-3.0%	48.0%	10.36
Saudi Industrial Services Co.	26.45	4.1%	30.3%	45.70	Alkhabeer REIT Fund	6.82	-2.9%	-10.3%	25.26
Mobile Telecommunication Company Saudi Arabia	10.94	3.6%	8.7%	82.62	Seera Group Holding	19.80	-2.9%	13.7%	29.31
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.	46.50	46.50	0.0%	18.77	Al Alamiya for Coop Insurance Co.	12.84	12.84	0.0%	0.74
Alamar Foods Co.	154.00	154.00	0.0%	6.69	Alkhabeer REIT Fund	6.82	6.82	0.0%	25.26
Nahdi Medical Co.	178.80	178.80	0.0%	26.62	Allied Cooperative Insurance Group	10.98	10.98	0.0%	0.59
Elm Co.	391.00	391.00	0.0%	33.67	Amana Cooperative Insurance Co.	9.71	9.71	0.0%	3.36
Saudi Tadawul Group Holding Co.	142.00	142.00	0.0%	42.67	CHUBB Arabia Coop Insurance Co.	17.68	17.68	0.0%	0.71

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Clicks Group Ltd	27448.00	1.8%	1.6%	14681.66	Aspen Pharmicare Holdings Ltd	16259.00	-3.7%	19.3%	18047.49
NEPI Rockcastle NV	11250.00	1.7%	9.1%	15975.00	Glencore	10846.00	-3.1%	-4.9%	42841.70
Capitec Bank Holdings Ltd	179024.00	1.1%	-3.7%	66231.72	MultiChoice Group	14711.00	-2.7%	25.5%	11875.01
British American Tobacco	69327.00	1.1%	2.8%	62023.40	Standard Bank Group Ltd	18425.00	-2.3%	9.8%	53616.75
Old Mutual Ltd	1241.00	1.1%	18.6%	15549.73	Absa Group Ltd	19596.00	-1.8%	1.1%	45266.76
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	40833.00	40961.00	-0.3%	30262.97	Mr Price Group Ltd	15185.00	15032.00	1.0%	9599.05
NEPI Rockcastle NV	11250.00	11299.00	-0.4%	15975.00	Clicks Group Ltd	27448.00	25757.00	6.6%	14681.66
Bidvest Group Ltd/The	26725.00	26979.00	-0.9%	32871.75	Vodacom Group Ltd	12791.00	11562.00	10.6%	15349.20
Absa Group Ltd	19596.00	21100.00	-7.1%	45266.76	British American Tobacco PLC	69327.00	58585.00	18.3%	62023.40
Woolworths Holdings Ltd	7153.00	8047.00	-11.1%	32832.27	MultiChoice Group	14711.00	10925.00	34.7%	11875.01

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Masan Group Corp	78300.00	5.2%	-15.8%	147.062,01	No Va Land Invest	10850.00	-1.8%	-22.5%	176.277,66
Saigon Securities Inc	19400.00	3.5%	9.6%	310.931,88	Techcombank	27100.00	-0.4%	4.8%	63.928,88
Hoa Phat Group JSC	21100.00	3.4%	17.2%	616.365,70					
Ho Chi Minh City Devp	18500.00	2.8%	16.0%	64.208,41					
Bank for Inv. and Devp	46900.00	2.4%	21.5%	76.278,45					
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	91900.00	96000.00	-4.3%	89.160,62	Vietnam Rubber Group	14400.00	14400.00	0.0%	8.053,31
Saigon Beer Alcohol Beverage Corp.	186900.00	197900.00	-5.6%	23.023,56	Mobile World Inv. Corp	39700.00	39700.00	0.0%	63.070,23
Bank for Inv. and Devp	46900.00	49950.00	-6.1%	76.278,45	No Va Land Invest	10850.00	10850.00	0.0%	176.277,66
Vinamilk	75800.00	87004.15	-12.9%	88.872,33	Phat Dat Real Estate Development Corp	11300.00	11300.00	0.0%	90.631,65
Asia Commercial JS Bank	24500.00	29080.00	-15.7%	114.368,63	Vinhomes	42300.00	42300.00	0.0%	71.190,83

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