

# Daily Market Report

11 April 2023

## JSE

JSE All-Share Index was closed on Monday on account of Family Day.

## BRVM

BRVM composite Index was closed on Monday on account of Easter.

## NSE

NGX All-Share Index was closed on Monday on account of Easter.

## EGX

EGX 30 Index increased by 0.60% and closed at 16,774.64 points on Monday, as the market gained LE 6 billion of market cap, amid Egyptian and Arab buying.

## ESG

Casablanca ESG 10 Index was up by 0.12% to close at 794.27 points on Monday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	↔	0.00%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	↔	0.00%
<b>NGX</b> Nigerian Stock Exchange	↔	0.00%
<b>EGX</b> Egyptian Stock Exchange	▲	0.60%
<b>ESG</b> Casablanca Stock Exchange	▲	0.12%

## African Markets

**Nigeria:** NGX 30 Index was closed on Monday on account of Easter.

**Egypt:** EGX 30 Index increased by 0.60% and closed at 16,774.64 points on Monday, as the market gained LE 6 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index was closed on Monday on account of Easter.

**South Africa:** JSE Top 40 Index was closed on Monday on account of Family Day.

## Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.83
<b>INTERBANK RATES</b>	
OPR	18.50 ↔
Overnight	18.88 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.40% to close at 9,499.20 points on Monday, as gains in the Telecommunications, Health Care, and Financials sectors led shares higher. MSCI UAE increased by 0.65% to close at 382.31 points.

**Vietnam:** VN-30 Index was down by 0.14% to close at 1,077.41 points Monday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.88% to close at 634.83 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.55% to close at 10,905.48 points on Monday, as losses in the Transportation, Software & Services, and Pharma, Biotech & Life Science sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.50% and closed at 1,481.70 points.

**India:** Nifty 50 Index was up by 0.14% to close at 17,624.05 points on Monday, as gains in the IT, Auto and Metal sectors led shares higher. MSCI India increased by 0.26% to close at 1,946.05 points.

## News

### Nigeria:

Nigeria's oil production records first decline in six months  
5G boosted telecoms foreign investment by 325% – NBS  
Imports from Russia hit N39bn despite war – Report

### Kenya:

Kenya's external debt balloons by Sh344bn on weak shilling  
WB approves \$390m financing for Kenya's digital economy  
Listed banks retain Sh105bn earnings

### Abu Dhabi:

UAE's banking assets climb 11.5% to \$996.6bn in January: CBUAE  
UAE's E&T Takes Majority Stake in Ride-Hailer Careem's Super App  
DEWA shareholders approve Dh4.77 billion in dividends

### Saudi Arabia:

Mining, mfg activities drive Saudi industrial production up 6% in Feb  
Saudi Arabia shortlists 13 bidders as it embarks on mining exploration  
M&A activities in Saudi Arabia to speed up despite global slowdown

### Egypt:

Egypt's annual inflation jumps to 33.9% in March  
NBE's proceeds from new CDs sale hit EGP 118B  
CIB discontinues sale of 22%-yield CDs, issues new 3 CDs

### South Africa:

Slide in mining and factory output expected to continue  
Eskom debt relief extended to municipalities  
Bid to seize ANC assets after failure to pay R102m bill

### India:

RBI simplifies guidelines for holding investment company  
Mutual funds invest Rs 1.82 lakh crore in equities in FY23  
India's fuel demand rises 5% in March year on year

### Vietnam:

Corporate bond trading system put in place from June 16  
Bac Giang earmarks 3.5 bn VND to encourage industry devpt  
Vietnam eyes 30 bn USD in food, food stuff exports annually

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,499.20	0.4%	0.4%	0.7%	-7.0%	AED/USD	3.67	0.0%	0.0%
Egypt	16,774.64	0.6%	0.4%	2.2%	14.9%	EGP/USD	31.08	0.6%	25.8%
India	17,624.05	0.1%	0.1%	1.5%	-2.7%	INR/USD	81.99	0.1%	-0.9%
Kenya	1,645.65	0.0%	0.0%	1.5%	-1.8%	KES/USD	133.60	0.0%	8.2%
Nigeria	1,890.64	0.0%	0.0%	-2.2%	2.6%	NGN/USD	460.33	0.0%	2.7%
Saudi Arabia	10,905.48	-0.5%	-0.01%	3.0%	4.1%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,378.91	0.0%	0.0%	1.2%	6.6%	ZAR/USD	18.50	1.3%	8.7%
Vietnam	1,077.41	-0.1%	-0.1%	0.3%	7.2%	VND/USD	23,447.50	0.0%	-0.8%

## MSCI Emerging Markets

MSCI Frontier	481.26	-0.4%	-0.4%	-0.5%	1.9%	Brent Crude (\$)	84.18	-1.1%	-2.0%
MSCI Frontier 100	1,104.40	-0.4%	-0.4%	-0.5%	1.3%	Gold (\$)	2,003.80	-1.1%	9.7%
MSCI Emerging	988.68	0.2%	0.2%	-0.2%	3.4%	Copper (\$)	8,800.00	0.0%	5.1%
MSCI World (USD)	2,786.20	-0.1%	-0.1%	-0.2%	7.1%	Coffee (\$)	173.96	0.12%	11.4%

## STOCKS

### Nigeria\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBA	8.55	2.4%	12.5%	152.39	Dangote Sugar	17.00	-2.9%	5.9%	17.73
United Capital PLC	11.70	1.3%	-16.4%	32.63	International Breweries	4.05	-1.2%	-13.8%	3.47
FBNH	11.10	0.9%	1.8%	15.02	Guaranty	24.40	-1.2%	6.1%	137.71
					UACN	8.50	-1.2%	-17.1%	6.13
					Lafarge Africa	25.80	-0.8%	7.5%	37.48
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	4.00	4.00	0.0%	0.91	Cap	17.90	15.25	17.4%	0.39
Total	218.80	218.80	0.0%	4.94	Custodian	5.65	4.55	24.2%	0.34
Seplat Petroleum	1150.00	1150.00	0.0%	50.72	Unilever	13.05	10.50	24.3%	1.85
P Z Cussons	11.00	11.00	0.0%	2.22	Guaranty	24.40	18.00	35.6%	137.71
Presco	150.80	150.80	0.0%	0.11	Sterling	1.54	1.13	36.3%	1.09

\*Market closed on 10/4

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
GHITHA HOLDING	41.62	15.0%	-89.8%	23.45	FOODCO NATIONAL FOODSTUFF	1.79	-9.6%	-99.6%	0.01
Gulf Cement Co.	0.40	8.4%	-99.9%	0.03	OOREDOO	8.60	-4.3%	-97.9%	0.00
Q Holding PSC	2.57	5.8%	-99.4%	10.68	Sudatel Telecom Group Company Ltd	0.42	-3.9%	-99.9%	0.22
National Marine Dredging Co.	24.00	5.5%	-94.1%	38.38	Methaq Takaful Insurance Compnay	0.58	-3.3%	-99.9%	0.12
Abu Dhabi Islamic Bank	10.86	4.2%	-97.4%	25.19	Ras Al Khaimah Poultry & Feeding Co.	2.13	-2.3%	-99.5%	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 Fujairah National Insurance Co.	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	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£)
QALA For Financial Investments	2.19	5.8%	5.3%	187.71	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.21	-2.2%	-25.6%	7.62
ELSWEDY ELECTRIC	16.99	5.3%	41.6%	134.94	Ezz Steel	39.80	-1.8%	71.2%	29.62
Palm Hills Development Co.	2.03	5.3%	3.6%	40.50	Sidi Kerir Petrochemicals	20.56	-1.6%	56.7%	58.32
Telecom Egypt	24.54	3.3%	-2.2%	24.69	Orascom Construction	97.37	-0.4%	1.5%	0.70
Oriental Weavers	14.12	3.1%	35.8%	22.63	Commercial International Bank	51.50	-0.4%	9.2%	5.11

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	24.54	24.54	0.0%	24.69	Housing & Development Bank	9.22	9.22	0.0%	22.64
Sidi Kerir Petrochemicals	20.56	20.56	0.0%	58.32	Cleopatra Hospital Co.	4.43	3.81	16.3%	3.57
Oriental Weavers	14.12	14.12	0.0%	22.63	Taaleem Management Services	3.17	2.72	16.5%	1.49
Orascom Construction	97.37	97.37	0.0%	0.70	Ibsina Pharma	1.49	1.10	35.4%	4.45
Misir Fertilizers Production Company	161.05	161.05	0.0%	4.32	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.21	1.62	36.4%	7.62

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	460.90	5.3%	18.8%	23500.458	Bajaj Finance	5830.00	-1.7%	-11.3%	5432.95
ONGC	156.60	4.0%	6.7%	2711.28	HUL	2527.80	-1.5%	-1.3%	2173.05
Adani Enterprises Limited	1797.00	2.5%	-53.4%	7526.00	Asian Paints	2776.35	-1.2%	-10.1%	3365.81
Grasim Industries	1705.00	2.2%	-1.1%	1403.95	Tata Consumer products ltd.	721.80	-1.2%	-5.9%	662.44
Wipro	374.10	2.0%	-4.7%	1042.55	Indusind Bank	1070.00	-1.1%	-12.3%	1716.64

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Dr Reddys Lab	4770.00	4772.20	0.0%	870.76	Tata Consumer products ltd.	721.80	686.60	5.1%	662.44
Larsen & Toubro	2310.00	2319.90	-0.4%	4512.20	Infosys	1427.00	1355.00	5.3%	7127.58
Ultratech Cement	7700.00	7772.00	-0.9%	1752.40	Wipro	374.10	355.00	5.4%	1042.55
ITC	388.00	394.00	-1.5%	2632.69	Cipla	902.00	852.00	5.9%	828.02
HDFC	2722.25	2780.00	-2.1%	8193.00	Divi's Laboratories Ltd	2905.75	2730.00	6.4%	458.45

## Kenya\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	30.00	7.1%	-4.8%	105.25	Stanbic Holdings	107.00	-4.0%	4.9%	48.17
Nairobi Securities Exchange Plc	6.44	6.6%	-5.0%	0.03	NCBA Group Plc	36.55	-2.5%	-7.1%	0.36
Nation Media Group	16.60	3.8%	4.1%	0.12	Diamond Trust Bank Limited	53.00	-0.9%	6.0%	0.21
Kenya Power & Lighting Limited	1.61	3.2%	3.2%	0.40	Centum Investment Company Plc	8.58	-0.9%	2.6%	0.03
Safaricom Plc	18.60	3.0%	-23.0%	81.38	Absa Bank Kenya	12.85	-0.8%	4.5%	1.27

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	169.00	170.00	-0.6%	1.27	WPP Scangroup Plc	2.83	2.77	2.2%	0.00
Absa Bank Kenya	12.85	12.95	-0.8%	1.27	Nairobi Securities Exchange Plc	6.44	6.02	7.0%	0.03
Stanbic Holdings	107.00	114.00	-6.1%	48.17	Centum Investment Company Plc	8.58	8.00	7.3%	0.03
The Coop Bank of Kenya Ltd	13.05	14.00	-6.8%	8.84	Kengen Limited	2.40	2.15	11.6%	1.81
NCBA Group Plc	36.55	40.00	-8.6%	0.36	Bamburi Cement Ltd	30.00	26.75	12.1%	105.25

\*Market closed on 10/4

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Fertilizer Co.	41.95	10.0%	29.9%	119.66	Ash-Sharqiyah Development Co.	56.50	-6.2%	14.1%	49.36
Anaam International Holding Group	26.05	9.8%	25.8%	130.26	Al Kathiri Holding Co.	70.50	-5.4%	98.3%	147.42
Al-Baha Investment and Development Co.	15.90	6.1%	38.3%	85.71	Arabian Cement Co.	35.80	-3.6%	6.7%	11.54
National Gypsum Co.	24.46	4.4%	10.1%	35.24	Taiba Investments Co.	28.70	-3.5%	15.4%	25.02
Arab Sea Information System Co.	83.80	4.1%	30.9%	290.32	Power & Water Utility Co for Jubail & Yanbu	55.80	-3.3%	19.0%	71.79
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)
Power & Water Utility Co for Jubail & Yanbu	55.80	55.80	0.0%	71.79	Al Alamiya for Coop Insurance Co.	13.40	13.40	0.0%	1.56
Riyadh Cables Group Co.	51.30	51.30	0.0%	10.68	Alkhabeer REIT Fund	6.59	6.59	0.0%	7.93
Alamar Foods Co.	140.80	140.80	0.0%	2.56	Allied Cooperative Insurance Group	12.40	12.40	0.0%	1.39
Nahdi Medical Co.	176.60	176.60	0.0%	16.57	Arabian Centres Co.	20.96	18.70	0.0%	7.12
Scientific and Medical Equipment House Co.	68.40	68.40	0.0%	7.61	Fawaz Abdulaziz Alhokair Co.	0.00	0.00	0.0%	0.00

## South Africa\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum Holdings Ltd	15118.00	5.0%	-19.2%	79671.86	Impala Platinum Holdings Ltd	15996.00	-2.4%	-25.0%	81899.52
British American Tobacco	64325.00	2.3%	-4.6%	24333.50	MultiChoice Group	11712.00	-2.0%	-0.1%	16279.68
Prosus NV	139492.00	2.0%	18.4%	182734.52	Cie Financiere Richemont SA	28043.00	-1.2%	25.7%	134886.83
Anglo American	59474.00	2.0%	20.9%	47036.20	Woolworths Holdings Ltd	6525.00	-0.8%	-1.8%	15986.25
Mondi	29045.00	1.9%	-0.2%	16587.02	Nedbank Group Ltd	22135.00	-0.4%	4.1%	40507.05
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	121486.00	121486.00	0.0%	21362.10	Anglo American Platinum Ltd	94536.00	94530.00	0.01%	20260.96
Bid Corp Ltd	40477.00	41225.00	-1.8%	15646.79	Clicks Group Ltd	26008.00	25227.00	3.1%	7809.94
Reinet Investments SCA	37500.00	38536.00	-2.7%	5094.75	Exxaro Resources Ltd	19002.00	17820.00	6.6%	18811.98
Bidvest Group Ltd	25509.00	27230.00	-6.3%	7568.27	Mr Price Group Ltd	14632.00	13450.00	8.8%	7986.15
NEPI Rockcastle NV	10584.00	11925.00	-11.2%	13335.84	Sasol Ltd	24613.00	22610.00	8.9%	22643.96

\*Market closed on 10/4

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Mobile World Inv. Corp	41000.00	5.1%	-4.4%	236.992,29	Hoa Phat Group JSC	20700.00	-2.4%	15.0%	555.591,59
PetroVietnam Power Corp	13350.00	2.3%	25.4%	161.448,04	Phat Dat Real Estate Development Corp	13200.00	-2.2%	-2.9%	119.918,93
Techcombank	30200.00	2.2%	16.8%	171.355,15	Bank for Inv. and Devp	44700.00	-2.1%	15.8%	81.582,89
Ho Chi Minh City Devp	19700.00	1.3%	23.5%	73.093,02	Petrovietnam Gas	99500.00	-1.7%	-2.0%	46.974,67
BaoViet Holdings	48900.00	0.8%	4.9%	10.970,01	Vietcombank	89000.00	-1.1%	11.3%	57.035,42
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	89000.00	96000.00	-7.3%	57.035,42	Vietnam Rubber Group	15900.00	15900.00	0.0%	50.495,51
Bank for Inv. and Devp	44700.00	49950.00	-10.5%	81.582,89	Mobile World Inv. Corp	41000.00	41000.00	0.0%	236.992,29
Saigon Beer Alcohol Beverage Corp.	176600.00	197900.00	-10.8%	34.269,77	No Va Land Invest	13300.00	13300.00	0.0%	322.909,60
Asia Commercial JS Bank	25000.00	29080.00	-14.0%	90.955,18	Phat Dat Real Estate Development Corp	13200.00	13200.00	0.0%	119.918,93
Vinamilk	74400.00	87004.15	-14.5%	62.068,11	Vietjet Aviation	102300.00	102300.00	0.0%	31.083,67

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