

Daily Market Report

17 April 2023

JSE

JSE All-Share Index increased by 0.52% and closed at 78,870.36 points on Friday, as the Financials and Industrials sectors recorded gains.

BRVM

BRVM composite Index increased by 0.37% and closed at 199.72 points on Friday, with SICOR and NSIA Banque CI being the top gainers.

NSE

NGX All-Share Index inched down by 0.10% to close at 51,983.94 points on Friday, as the Consumer Goods sector recorded losses.

EGX

EGX 30 Index was closed on Sunday on account of Easter.

ESG

Casablanca ESG 10 Index increased by 0.25% to close at 792.28 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.52%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.37%
NGX Nigerian Stock Exchange	▼	0.10%
EGX Egyptian Stock Exchange	↔	0.00%
ESG Casablanca Stock Exchange	▲	0.25%

African Markets

Nigeria: NGX 30 Index was marginally increased by 0.03% to close at 1,859.38 points on Friday. International Breweries and Fidelity were the top gainers.

Egypt: EGX 30 Index was closed on Sunday on account of Easter.

Kenya: NSE 20 Index decreased by 0.27% and closed at 1,613.85 points on Friday. Total Kenya Ltd and Bamburi Cement Limited were the top losers.

South Africa: JSE Top 40 Index increased by 0.59% and closed at 73,133.74 points on Friday as the Financials and Industrials sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.93
INTERBANK RATES	
OPR	18.63 ▼
Overnight	19.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.68% to close at 9,623.05 points on Friday, as gains in the Health Care, Real Estate, and Industrials sectors led shares higher. MSCI UAE increased by 0.67% to close at 390.99 points.

Vietnam: VN-30 Index declined by 1.05% to close at 1,063.43 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.63% to close at 628.67 points.

Saudi Arabia: Tadawul All Share Index increased by 0.62% to close at 11,032.57 points on Sunday, as gains in the Transportation, Commercial & Professional Svc, and Food & Staples sectors led shares higher. MSCI Saudi Arabia increased by 0.59% and closed at 1,495.92 points.

India: Nifty 50 Index was closed on Friday on account of Dr. Baba Saheb Ambedkar Jayanti.

News

Nigeria:

UBA grows Q1 earnings by 48%, profit hits N61bn
Dangote Sugar pays N18bn dividend
GTCC records N214bn profit

Kenya:

NSE posts worst dollar returns on weak shilling
Sh1bn shareholder loan boosts Sanlam General
Property auctions back as value of seized assets falls

Abu Dhabi:

UAE and Brazil seal deals worth \$2.5bn for sustainable aviation fuel
SCA activates applications for legacy VA operators
Dubai Court orders KPMG to pay investors \$231m over Abraaj audit

Saudi Arabia:

Saudi Aramco's 4% stakes transferred to PIF's Sanabil Investments
Saudi Arabia and the Netherlands discuss energy cooperation
Service launched to offer digital financing solutions to Saudi pensioners

Egypt:

Egypt signs MoU with global firm to enhance investment climate
FRA releases new regulations regarding investment funds dealing in minerals
Suez Canal revenue jumps 35% in Q1 2023

South Africa:

SA walks investment tightrope as it secures new pledges
BHP wins over Oz Minerals' shareholders in R118bn deal
Amazon Web Services to invest another R15bn in SA

India:

HDFC Bank posts 21% rise in Q4 PAT; dividend of Rs 19/share announced
India's forex reserves jump to 9-month high
TCS expects more biz from UBS-Credit Suisse merger

Vietnam:

Std Chartered partners with MISA to provide financing to SMEs
Binh Duong's first net-zero industrial cluster to be built
Vietnam, Uruguay seek ways to boost cooperation

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,623.05	0.7%	0.0%	2.0%	-5.8%	AED/USD	3.67	0.0%	0.0%
Egypt	17,671.27	0.0%	0.0%	7.6%	21.0%	EGP/USD	30.93	0.1%	25.2%
India	17,828.00	0.0%	0.0%	2.7%	-1.5%	INR/USD	81.85	0.2%	-1.1%
Kenya	1,613.85	-0.3%	0.0%	-0.5%	-3.7%	KES/USD	132.45	-1.5%	7.2%
Nigeria	1,859.38	0.03%	0.0%	-3.8%	0.9%	NGN/USD	464.50	-0.2%	3.7%
Saudi Arabia	11,032.57	0.6%	0.6%	4.2%	5.3%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,133.74	0.6%	0.0%	3.7%	9.2%	ZAR/USD	18.11	0.4%	6.4%
Vietnam	1,063.43	-1.0%	0.0%	-1.0%	5.8%	VND/USD	23,447.50	0.0%	-0.8%

MSCI Emerging Markets

MSCI Frontier	482.48	-0.6%	0.0%	-0.3%	2.1%	Brent Crude (\$)	86.31	0.3%	0.5%
MSCI Frontier 100	1,104.20	-0.8%	0.0%	-0.5%	1.2%	Gold (\$)	2,015.80	-1.9%	10.4%
MSCI Emerging	1,000.49	0.3%	0.0%	1.0%	4.6%	Copper (\$)	9,023.50	-0.4%	7.8%
MSCI World (USD)	2,825.75	-0.1%	0.0%	1.2%	8.6%	Coffee (\$)	183.83	2.7%	17.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.69	9.7%	49.6%	19.05	Cadbury	10.20	-9.7%	-14.3%	1.58
International Breweries	4.50	3.4%	-4.3%	3.72	Wema	3.80	-5.0%	-2.6%	2.17
Fidelity	5.09	1.6%	17.0%	217.99	FBNH	10.45	-4.1%	-4.1%	10.10
Sterling	1.48	0.7%	5.7%	19.42	Stanbic IBTC	34.50	-3.1%	3.1%	23.58
UBA	8.50	0.6%	11.8%	798.65	Dangote Sugar	17.00	-1.4%	5.9%	22.44
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	3.80	3.80	0.0%	2.17	Cap	17.90	15.25	17.4%	0.20
Transnational Corporation	1.69	1.69	0.0%	19.05	Unilever	12.90	10.50	22.9%	0.72
Total	218.80	218.80	0.0%	7.67	Custodian	5.65	4.55	24.2%	9.86
Seplat Petroleum	1150.00	1150.00	0.0%	2.12	Sterling	1.48	1.13	31.0%	19.42
P Z Cussons	11.00	11.00	0.0%	3.59	Guaranty	24.40	18.00	35.6%	157.41

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Methaq Takaful Insurance Compnay	0.69	14.9%	-99.8%	2.84	FOODCO NATIONAL FOODSTUFF	1.62	-9.5%	-99.6%	0.08
Bank of Sharjah	0.42	8.6%	-99.9%	5.57	Umm Al Qaiwain General Investment	1.07	-9.3%	-99.7%	0.00
Hayah Insurance Company	0.82	6.5%	-99.8%	0.05	Invictus Investment Co.	3.17	-4.8%	-99.2%	9.93
Manazel	0.39	5.7%	-99.9%	5.68	RAK Co. for White Cement & Const Materials	1.44	-2.0%	-99.6%	0.00
Bayanat Al	4.01	4.7%	-99.0%	15.73	Al Yah Satellite Communications Co	2.63	-1.9%	-99.4%	0.76
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	Presight AI Holding	0.00	0.00	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	Union Insurance Co.	0.50	0.50	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£)
Commercial International Bank	58.50	14.5%	41.0%	306.94	Orascom Construction	96.14	-1.8%	0.2%	4.46
Oriental Weavers	15.59	6.9%	49.9%	63.16	Tenth Of Ramadan Pharma Ind. & Diagnostic-Rameda	2.14	-1.4%	-27.9%	9.55
Telecom Egypt	25.80	4.0%	2.8%	56.49	Cairo For Investment And Real Estate Development	10.02	-1.3%	-22.9%	5.15
Misir Fertilizers Production Co.	170.66	3.8%	19.9%	24.57	Taaleem Management Services	3.13	-1.3%	-21.8%	1.83
Sidi Kerir Petrochemicals	21.61	3.7%	64.7%	99.20	Egyptian Financial Group	16.80	-0.9%	32.3%	26.51
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	25.80	25.80	0.0%	56.49	Housing & Development Bank	9.86	9.86	0.0%	85.82
Sidi Kerir Petrochemicals	21.61	21.61	0.0%	99.20	Taaleem Management Services	3.13	2.72	15.1%	1.83
Oriental Weavers	15.59	15.59	0.0%	63.16	Cleopatra Hospital Co.	4.40	3.81	15.5%	5.68
Orascom Construction PLC	96.14	96.14	0.0%	4.46	Ibnsina Pharma	1.45	1.10	32.1%	4.69
Misir Fertilizers Production Co.	170.66	170.66	0.0%	24.57	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.14	1.62	32.1%	9.55

*Market closed on 16/4

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	1105.00	2.8%	-9.4%	6557.031	Infosys	1383.40	-3.1%	-8.3%	15707.77
HDFC Life Insurance Company Ltd	531.35	2.8%	-6.2%	2189.07	Tech Mahindra	1085.80	-2.2%	6.8%	2957.91
Eicher Motors	3212.50	2.7%	-0.5%	4281.56	Hcl Technologies	1072.50	-2.0%	3.2%	3291.74
Apollo Hospitals Enterprise Ltd	4404.95	2.0%	-1.6%	5572.57	NTPC	173.00	-1.6%	3.9%	1723.96
Power Grid Corp Of India	231.65	1.9%	8.4%	1965.01	Bharat Petroleum	332.35	-1.5%	0.6%	1389.11
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
HDFC	2791.95	2791.95	0.0%	14419.76	Infosys	1383.40	1355.00	2.1%	15707.77
Bajaj Auto	4290.00	4307.35	-0.4%	1591.89	Wipro	367.25	355.00	3.5%	1236.56
Hdfc Bank	1695.00	1702.40	-0.4%	29795.63	Tata Consumer products ltd.	718.00	686.60	4.6%	361.87
ITC	395.70	398.10	-0.6%	2395.44	Cipla	914.70	852.00	7.4%	978.93
Ultratech Cement	7662.00	7794.00	-1.7%	2242.41	Reliance Industries	2356.00	2180.00	8.1%	13447.55

*Market closed on 14/4

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	15.35	1.7%	-3.8%	0.03	Total Kenya Ltd	21.10	-5.8%	-11.5%	0.20
WPP Scangroup Plc	2.85	0.7%	-5.3%	0.06	Bamburi Cement Limited	28.20	-4.9%	-10.5%	1.05
Diamond Trust Bank Limited	53.00	0.5%	6.0%	0.07	Centum Investment Company Plc	8.70	-1.6%	4.1%	0.03
Stanbic Holdings	110.75	0.5%	8.6%	0.50	The Cooperative Bank of Kenya Ltd	13.00	-1.5%	5.7%	10.11
NCBA Group Plc	37.00	0.3%	-6.0%	4.61	KCB Group Plc	33.90	-1.5%	-11.0%	9.03
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	170.00	170.25	-0.1%	3.72	WPP Scangroup Plc	2.85	2.77	2.9%	0.06
Absa Bank Kenya	12.70	12.95	-1.9%	1.16	Nairobi Securities Exchange Plc	6.20	6.02	3.0%	0.03
Stanbic Holdings	110.75	114.00	-2.9%	0.50	Bamburi Cement Limited	28.20	26.75	5.4%	1.05
The Cooperative Bank of Kenya Ltd	13.00	14.00	-7.1%	10.11	Nation Media Group	15.35	14.15	8.5%	0.03
NCBA Group Plc	37.00	40.00	-7.5%	4.61	Centum Investment Company Plc	8.70	8.00	8.7%	0.03

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Emaar The Economic City	9.48	10.0%	13.7%	117.57	Tihama Advertising and Public Relations Co.	24.42	-4.1%	-63.6%	13.87
Al Kathiri Holding Co.	4.19	10.0%	-88.2%	4.81	Alamar Foods Co.	135.60	-3.1%	-2.3%	12.23
Arabian Pipes Co.	48.50	7.3%	21.3%	53.54	Saudi Cement Co.	55.80	-3.0%	9.4%	31.82
Arriyadh Development Co.	20.58	5.3%	13.8%	16.88	Middle East Specialized Cables Co.	12.88	-2.6%	30.1%	7.21
Kingdom Holding Co.	8.52	5.2%	10.1%	13.58	National Agricultural Marketing Co.	38.30	-2.3%	122.7%	27.41
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	58.20	58.20	0.0%	46.19	Al Alamiya for Coop Insurance Co.	13.40	13.40	0.0%	0.90
Riyadh Cables Group Co.	53.20	53.20	0.0%	6.14	Alandalus Property Co.	18.06	14.40	0.0%	1.69
Nahdi Medical Co.	176.00	176.00	0.0%	17.08	Alkhabeer REIT Fund	6.58	6.58	0.0%	2.08
Scientific and Medical Equipment House Co.	70.00	70.00	0.0%	53.68	Allied Cooperative Insurance Group	12.68	12.68	0.0%	1.80
Elm Co.	422.40	422.40	0.0%	14.69	Dar Alarkan Real Estate Development Co.	15.82	6.68	0.0%	22.06

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Cie Financiere Richemont SA	30365.00	3.6%	36.1%	176724.30	Sibanye Stillwater Ltd	3848.00	-4.4%	-14.0%	45752.72
Remgro Ltd	14250.00	2.7%	7.1%	15960.00	Gold Fields Ltd	27093.00	-3.8%	53.8%	127608.03
Old Mutual Ltd	1153.00	2.3%	10.2%	24443.60	Sasol Ltd	24426.00	-3.3%	-9.3%	65217.42
Mr Price Group Ltd	15563.00	2.2%	-2.1%	15718.63	AngloGold Ashanti Ltd	49189.00	-2.9%	49.4%	129858.96
Naspers Ltd	321975.00	1.9%	14.0%	284313.58	Impala Platinum Holdings Ltd	16768.00	-2.7%	-21.3%	49800.96
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	40415.00	41225.00	-2.0%	20450.80	Anglo American Platinum Ltd	100384.00	94530.00	6.2%	31406.14
Reinet Investments SCA	37552.00	38536.00	-2.6%	8333.54	Clicks Group Ltd	26838.00	25227.00	6.4%	10743.52
Anheuser-Busch InBev SA/NV	117393.00	121092.00	-3.1%	28260.02	Exxaro Resources Ltd	19046.00	17820.00	6.9%	9595.37
Bidvest Group Ltd	25350.00	27230.00	-6.9%	16835.70	Sasol Ltd	24426.00	22610.00	8.0%	65217.42
NEPI Rockcastle NV	10866.00	11925.00	-8.9%	7862.20	Mr Price Group Ltd	15563.00	13450.00	15.7%	15718.63

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Hoa Phat Group JSC	20650.00	1.0%	14.7%	281.298,65	Techcombank	28900.00	-4.3%	11.8%	277.391,07
Vincom Retail	28600.00	0.7%	8.7%	76.965,67	Phat Dat Real Estate Development Corp	13400.00	-4.3%	-1.5%	139.809,75
Vietcombank	88400.00	0.2%	10.5%	36.739,09	Vietnam Rubber Group	15300.00	-4.1%	10.9%	71.293,62
					PetroVietnam Power Corp	13100.00	-2.6%	23.0%	88.904,50
					Mobile World Inv. Corp	40000.00	-2.6%	-6.8%	108.826,44
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	88400.00	96000.00	-7.9%	36.739,09	Vietnam Rubber Group	15300.00	15300.00	0.0%	71.293,62
Bank for Inv. and Devp	44450.00	49950.00	-11.0%	27.617,36	Mobile World Inv. Corp	40000.00	40000.00	0.0%	108.826,44
Asia Commercial JS Bank	24950.00	29080.00	-14.2%	125.540,00	No Va Land Invest	14200.00	14200.00	0.0%	489.325,45
Saigon Beer Alcohol Beverage Corp.	167000.00	197900.00	-15.6%	46.734,31	Phat Dat Real Estate Development Corp	13400.00	13400.00	0.0%	139.809,75
Vinamilk	72800.00	87004.15	-16.3%	94.590,63	Vingroup JSC	52900.00	52900.00	0.0%	88.123,26

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