

Daily Market Report

18 April 2023

JSE

JSE All-Share Index was down by 0.19% and closed at 78,723.70 points on Monday, as the Financials and Consumer Staples sectors recorded losses.

BRVM

BRVM composite Index decreased by 0.21% and closed at 199.31 points on Monday, with Bernabe Côte d'Ivoire and Saph Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index dropped by 1.48% to close at 51,127.38 points on Monday, as the Banking sector recorded losses.

EGX

EGX 30 Index was closed on Monday on account of Sham Ennessim.

ESG

Casablanca ESG 10 Index inched down by 0.04% to close at 792.00 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.19%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.21%
NGX Nigerian Stock Exchange	▼	1.48%
EGX Egyptian Stock Exchange	↔	0.00%
ESG Casablanca Stock Exchange	▼	0.04%

African Markets

Nigeria: NGX 30 Index dropped by 1.46% to close at 1,832.19 points on Monday. MTNN and FBNH were the top losers.

Egypt: EGX 30 Index was closed on Monday on account of Sham Ennessim.

Kenya: NSE 20 Index decreased by 0.35% and closed at 1,608.22 points on Monday. Safaricom Plc and Total Kenya Ltd were the top losers.

South Africa: JSE Top 40 Index was down by 0.13% and closed at 73,035.70 points on Monday, as the Financials and Consumer Staples sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	22.04%
Exchange Rate	₦ 460.93
INTERBANK RATES	
OPR	18.63 ↔
Overnight	19.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.24% to close at 9,645.97 points on Monday, as gains in the Telecommunications, Real Estate, and Industrials sectors led shares higher. MSCI UAE jumped by 1.19% to close at 395.63 points.

Vietnam: VN-30 Index was up by 0.15% to close at 1,065.02 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam was up by 0.11% to close at 629.37 points.

Saudi Arabia: Tadawul All Share Index jumped by 1.19% to close at 11,163.57 points on Monday, as gains in the Energy, Commercial & Professional Svc, and Utilities sectors led shares higher. MSCI Saudi Arabia increased by 1.03% and closed at 1,511.40 points.

India: Nifty 50 Index declined by 0.68% to close at 17,706.85 points on Monday, as losses in the IT, Media, and Pharma sectors pushed shares lower. MSCI India decreased by 0.52% to close at 1,953.04 points.

News

Nigeria:

Headline Inflation Increases by 22.04% YoY in March 2023
External reserves slide further to \$35bn
Boll Group assets hit N2.38tn

Kenya:

Ruto, Biden teams open trade talks amid farmers protest
IFC to invest \$10.4bn in pan-African fund manager
Epra reinstates caps on wholesale fuel prices from next month

Abu Dhabi:

ADNOC signs deals with Japan for low-carbon hydrogen value chain
Abu Dhabi Commercial Bank profits leap 27%
Mubadala and G42 launch tech-focused healthcare company M42

Saudi Arabia:

Fitch upgrades eight Saudi banks' long-term issuer default ratings to 'A-'
ACWA Power to develop 1,000 MW solar plant in Iraq
Saudi's CMA approves capital increase for two listed mining companies

Egypt:

CBN takes steps to overcome economic impact of COVID-19, war in Ukraine
IMF waits for more reforms before disbursing its 2nd tranche of loan to Egypt
Egypt's Supreme Council for Investments Established by Presidential Decree

South Africa:

Transnet appoints Deloitte, EY in new co-sourced internal audit strategy
Glencore digs in for battle as momentum shifts against Teck
Sappi transaction to sell European graphic paper mills lapses

India:

WPI inflation eases to 29-month low of 1.34% in March
In 25% jump, Railways registers record Rs 2.4 lakh cr revenue
Apple's India sales near \$6 billion as Tim Cook begins retail push

Vietnam:

Govt agrees with MoF's proposal on 2% VAT reduction for 2023
VN, Australia to double two-way investment scale
Foreign investment to vitalise domestic railway sector

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,645.97	0.2%	0.2%	2.3%	-5.5%	AED/USD	3.67	0.0%	0.0%
Egypt	17,671.27	0.0%	0.0%	7.6%	21.0%	EGP/USD	30.90	-0.1%	25.1%
India	17,706.85	-0.7%	-0.7%	2.0%	-2.2%	INR/USD	81.99	0.2%	-0.9%
Kenya	1,608.22	-0.3%	-0.3%	-0.9%	-4.0%	KES/USD	134.75	1.7%	9.1%
Nigeria	1,832.19	-1.5%	-1.5%	-5.2%	-0.6%	NGN/USD	460.42	-0.9%	2.8%
Saudi Arabia	11,163.57	1.2%	1.8%	5.4%	6.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,035.70	-0.1%	-0.1%	3.6%	9.1%	ZAR/USD	18.30	1.1%	7.5%
Vietnam	1,065.02	0.1%	0.1%	-0.8%	6.0%	VND/USD	23,505.50	0.2%	-0.5%

MSCI Emerging Markets

MSCI Frontier	479.83	-0.5%	-0.5%	-0.8%	1.6%	Brent Crude (\$)	84.76	-1.8%	-1.3%
MSCI Frontier 100	1,097.06	-0.6%	-0.6%	-1.2%	0.6%	Gold (\$)	2,007.00	-0.4%	9.9%
MSCI Emerging	1,003.78	0.3%	0.3%	1.4%	5.0%	Copper (\$)	8,964.50	-0.7%	7.1%
MSCI World (USD)	2,827.24	0.1%	0.1%	1.3%	8.6%	Coffee (\$)	183.74	-0.05%	17.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.85	9.5%	63.7%	117.36	MTNN	224.00	-6.7%	4.2%	131.37
P Z Cussons	11.55	5.0%	1.8%	3.55	Wema	3.66	-3.7%	-6.2%	2.98
UBA	7.90	3.9%	3.9%	80.69	FBNH	10.30	-1.4%	-5.5%	30.96
Axamansard	2.28	3.6%	14.0%	12.46	FCMB	3.50	-1.4%	-9.1%	2.58
International Breweries	4.65	3.3%	-1.1%	6.53	Sterling	1.46	-1.4%	4.3%	33.25
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	3.66	3.66	0.0%	2.98	Cap	17.90	15.25	17.4%	0.70
Transnational Corporation	1.85	1.85	0.0%	117.36	Unilever	12.90	10.50	22.9%	1.51
Total	218.80	218.80	0.0%	17.54	Custodian	5.65	4.55	24.2%	2.33
Seplat Petroleum	1150.00	1150.00	0.0%	78.47	Sterling	1.46	1.13	29.2%	33.25
P Z Cussons	11.55	11.55	0.0%	3.55	Guaranty	25.00	18.00	38.9%	181.82

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Umm Al Qaiwain General Investment Co. P.S.C	1.23	15.0%	-99.7%	9.31	Sudatel Telecom Group Co. Ltd	0.39	-6.5%	-99.9%	0.45
Hayah Insurance Company	0.93	13.3%	-99.8%	0.12	ESG EMIRATES STALLIONS GROUP	5.14	-4.8%	-98.7%	10.18
Alpha Dhabi Holding	21.70	4.0%	-94.7%	126.18	Gulf Cement Co.	0.40	-3.4%	-99.9%	0.08
Al Seer Marine Supplies & Equipment Company P.J.S.C	8.08	3.6%	-98.0%	12.45	Emirates Driving Co.	25.00	-2.7%	-93.9%	5.27
Multiply Group PJS	3.12	2.3%	-99.2%	47.00	RAK Ceramics PJSC	2.55	-2.7%	-99.4%	2.35
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 Company	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 P.J.S.C	4.07	4.07	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	The National Investor PRJSC	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 17/4

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Nestle India Limited	20225.10	3.9%	3.2%	3913.644	Infosys	1259.00	-9.4%	-16.5%	65930.79
Power Grid Corp Of India	236.20	2.2%	10.5%	3875.50	Tech Mahindra	1030.50	-5.2%	1.4%	4446.76
State Bank Of India	544.40	2.2%	-11.3%	17508.67	Hcl Technologies	1042.30	-2.8%	0.3%	9831.72
Britannia Inds.	4348.75	2.0%	1.0%	2739.39	Larsen & Toubro	2213.00	-2.0%	6.1%	9149.65
Coal India	229.25	1.7%	1.9%	1430.83	NTPC	169.75	-1.9%	2.0%	2967.24
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	399.90	402.00	-0.5%	4412.63	Wipro	361.70	352.00	2.8%	2436.49
Ultratech Cement	7748.00	7824.00	-1.0%	3791.54	Tata Consumer products ltd.	713.60	686.60	3.9%	843.36
Bajaj Auto	4255.00	4311.00	-1.3%	3062.21	Infosys	1259.00	1185.30	6.2%	65930.79
Dr Reddys Lab	4843.10	4922.95	-1.6%	1656.40	Cipla	907.00	852.00	6.5%	2357.69
Hdfc Bank	1665.05	1720.00	-3.2%	27044.04	Tata Consultancy Svs.	3139.00	2926.10	7.3%	17127.20

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corporation Ltd	1.94	6.6%	6.0%	0.15	Safaricom Plc	17.05	-4.2%	-29.4%	58.98
Equity Group Holdings Plc	45.35	1.9%	1.9%	0.91	Total Kenya Ltd	20.40	-3.3%	-14.5%	1.40
NCBA Group Plc	37.50	1.4%	-4.7%	7.65	Nairobi Securities Exchange Plc	6.02	-2.9%	-11.2%	0.42
Nation Media Group	15.55	1.3%	-2.5%	0.02	Centum Investment Company Plc	8.52	-2.1%	1.9%	0.36
The Cooperative Bank of Kenya Ltd	13.05	0.4%	6.1%	3.65	WPP Scangroup Plc	2.80	-1.8%	-7.0%	0.02
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	170.25	170.25	0.0%	10.32	Nairobi Securities Exchange Plc	6.02	6.02	0.0%	0.42
Absa Bank Kenya	12.65	12.95	-2.3%	3.95	WPP Scangroup	2.80	2.77	1.1%	0.02
Stanbic Holdings	110.75	114.00	-2.9%	0.50	Safaricom	17.05	16.35	4.3%	58.98
NCBA Group Plc	37.50	40.00	-6.3%	7.65	Bamburi Cement Ltd	28.00	26.75	4.7%	0.50
The Cooperative Bank of Kenya Ltd	13.05	14.00	-6.8%	3.65	Centum Investment Company	8.52	8.00	6.5%	0.36

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Dallah Healthcare Co.	164.60	6.9%	11.2%	35.71	Al Kathiri Holding Co.	3.78	-9.8%	-89.4%	81.05
ACWA POWER Co.	156.00	5.0%	2.6%	73.44	Saudi Ceramic Co.	31.65	-6.9%	10.9%	78.09
Emaar The Economic City	9.94	4.9%	19.2%	137.22	Tihama Advertising and Public Relations Co.	23.22	-4.9%	-65.3%	12.43
Saudi Arabian Oil Co.	34.65	4.7%	7.9%	432.53	The Company for Cooperative Insurance	100.60	-4.2%	25.0%	40.21
Saudi Marketing Co.	28.00	3.7%	53.8%	10.83	Mobile Telecom Co.	15.28	-4.0%	51.9%	254.57
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	58.30	58.30	0.0%	54.93	Al Alamiya for Coop Insurance Co.	13.24	13.24	0.0%	0.70
Riyadh Cables Group Co.	53.30	53.30	0.0%	6.72	Alandalus Property Co.	18.20	14.40	0.0%	2.34
Nahdi Medical Co.	178.80	178.80	0.0%	30.78	Alkhabeer REIT Fund	6.65	6.65	0.0%	2.61
Scientific and Medical Equipment House Co.	69.80	69.80	0.0%	24.37	Allied Cooperative Insurance Group	12.52	12.52	0.0%	1.12
Elm Co.	436.80	436.80	0.0%	97.73	Dar Alarkan Real Estate Development Co.	15.88	6.68	0.0%	23.23

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	336024.00	4.4%	19.0%	290613.72	Nedbank Group Ltd	20986.00	-2.5%	-1.3%	60229.82
Prosus NV	140944.00	4.2%	19.7%	224100.96	MTN Group Ltd	12758.00	-2.3%	0.2%	43122.04
Impala Platinum Holdings Ltd	17223.00	2.7%	-19.2%	102821.31	Remgro Ltd	13943.00	-2.2%	4.8%	13803.57
Gold Fields Ltd	27604.00	1.9%	56.7%	101858.76	MultiChoice Group	11331.00	-2.1%	-3.4%	8430.83
BHP Group Ltd	56550.00	1.9%	7.4%	41141.26	Woolworths Holdings Ltd	6451.00	-2.1%	-2.9%	25481.45
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	40500.00	41225.00	-1.8%	35205.84	Clicks Group Ltd	26266.00	25227.00	4.1%	14599.17
Anheuser-Busch InBev SA/NV	118624.00	121092.00	-2.0%	19505.34	Exxaro Resources Ltd	18803.00	17820.00	5.5%	14180.09
Reinet Investments SCA	37491.00	38536.00	-2.7%	8941.98	Anglo American Platinum Ltd	100000.00	94530.00	5.8%	20219.00
Bidvest Group Ltd/The	25158.00	27230.00	-7.6%	16108.67	Sasol Ltd	24095.00	22610.00	6.6%	42166.25
NEPI Rockcastle NV	10849.00	11925.00	-9.0%	8844.54	Mr Price Group Ltd	15310.00	13450.00	13.8%	19290.60

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
No Va Land Invest	14800.00	4.2%	5.7%	245.225,34	Saigon Beer Alcohol Beverage Corp.	164000.00	-1.8%	-1.7%	38.597,11
Phat Dat Real Estate Development Corp	13900.00	3.7%	2.2%	95.317,13	BaoViet Holdings	47200.00	-1.7%	1.3%	20.904,24
PetroVietnam Power Corp	13350.00	1.9%	25.4%	80.154,44	Vinamilk	71700.00	-1.5%	-5.8%	98.284,37
Techcombank	29450.00	1.9%	13.9%	87.803,23	Vincom Retail	28300.00	-1.1%	7.6%	44.938,28
Bank for Inv. and Devp	45000.00	1.2%	16.6%	32.070,19	Ho Chi Minh City Devp	19300.00	-1.0%	21.0%	27.290,80
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%	43.139,30	Vietnam Rubber Group	15400.00	15400.00	0.0%	21.137,49
Bank for Inv. and Devp	45000.00	49950.00	-9.9%	32.070,19	Mobile World Inv. Corp	39850.00	39850.00	0.0%	55.966,32
Asia Commercial JS Bank	25000.00	29080.00	-14.0%	41.100,88	No Va Land Invest	14800.00	14800.00	0.0%	245.225,34
Saigon Beer Alcohol Beverage Corp.	164000.00	197900.00	-17.1%	38.597,11	Phat Dat Real Estate Development Corp	13900.00	13900.00	0.0%	95.317,13
Vinamilk	71700.00	87004.15	-17.6%	98.284,37	Vingroup JSC	52900.00	52900.00	0.0%	92.591,72

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