

# Daily Market Report

19 April 2023

## JSE

JSE All-Share Index increased by 0.73% and closed at 79,294.76 points on Tuesday, as the Resources and Industrials sectors recorded gains.

## BRVM

BRVM composite Index was closed on Tuesday on account of Laylat al-Qadr.

## NSE

NGX All-Share Index inched up by 0.02% to close at 51,138.92 points on Tuesday, as the Oil & Gas and Consumer Goods sectors recorded gains.

## EGX

EGX 30 Index declined by 0.75% and closed at 17,538.97 points on Tuesday, amid foreign selling.

## ESG

Casablanca ESG 10 Index was down by 0.14% to close at 790.93 points on Tuesday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	0.73%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	↔	0.00%
<b>NGX</b> Nigerian Stock Exchange	▲	0.02%
<b>EGX</b> Egyptian Stock Exchange	▼	0.75%
<b>ESG</b> Casablanca Stock Exchange	▼	0.14%

## African Markets

**Nigeria:** NGX 30 Index was up by 0.17% to close at 1,835.20 points on Tuesday. Sterling and FBNH were the top gainers.

**Egypt:** EGX 30 Index declined by 0.75% and closed at 17,538.97 points on Tuesday, amid foreign selling.

**Kenya:** NSE 20 Index decreased marginally by 0.03% and closed at 1,607.75 points on Tuesday. Kenya Reinsurance Corporation Ltd and Equity Group Holdings Plc were the top losers.

**South Africa:** JSE Top 40 Index increased by 0.88% and closed at 73,676.50 points on Tuesday as the Resources and Industrials sectors recorded gains.

## Nigeria Key Indicators

	Current
Inflation	22.04%
Exchange Rate	₦ 460.93
<b>INTERBANK RATES</b>	
OPR	18.62 ↔
Overnight	19.00 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index inched down by 0.08% to close at 9,638.10 points on Tuesday, as losses in the Health Care, Real Estate, and Financials sectors pushed shares lower. MSCI UAE was down by 0.18% to close at 394.94 points.

**Vietnam:** VN-30 Index decreased marginally by 0.04% to close at 1,064.55 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.40% to close at 631.87 points.

**Saudi Arabia:** Tadawul All Share Index was closed on Tuesday on account of Eid-al-Fitr.

**India:** Nifty 50 Index decreased by 0.26% to close at 17,660.15 points on Tuesday, as losses in the FMCG, Media, and Financial Services sectors pushed shares lower. MSCI India inched down by 0.09% to close at 1,951.36 points.

## News

### Nigeria:

FG plans 13 fresh oil sector policies  
DisCos collect N202.62b in Q3 2022  
IKEDC generates highest revenue in Q3, Q4 2022 -NBS

### Kenya:

KCB, NBK ink deal to sell Sanlam Life's products  
StanChart loans to sister banks rise to Sh83bn  
Shilling slumps against the British pound by 11% since Jan

### Abu Dhabi:

Abu Dhabi National Energy Co. issues bonds valued at \$1.5bn  
UAE banks' capital and reserves in January rises 8.5% to \$119.5bn  
Dubai records 42% surge in tourists; hotel keys hit 150,000

### Saudi Arabia:

MODON attracts \$890m investment from private sector in Q1  
Saudi Industrial Development Fund approves \$233m in loans in Q1 2023  
Saudi Arabia to benefit from OPEC cuts thanks to oil price boost

### Egypt:

Egypt releases \$15 bln in imported goods from ports in Q1 2023  
Suez Canal signs coop protocol with Internal Trade Devpt Authority  
22% decline in Cairo Investment profits by the end of February 2023

### South Africa:

Business confidence slips in March, but tourism a bright spot  
Grim load shedding to squeeze economy even more in Q2  
Capitec Bank FY profits jump 15%

### India:

SBI board approves raising up to \$2 billion via long-term debt  
Foreigners snap up \$2 billion of India's index-eligible debt  
ICICI Lombard Q4 net jumps 40%

### Vietnam:

Việt Nam jumps in EIU's global business environment ranking  
EQR, Masan subsidiary partner to explore tungsten  
Austrian firms eye investment cooperation with Hanoi

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,638.10	-0.1%	0.2%	2.2%	-5.6%	AED/USD	3.67	0.0%	0.0%
Egypt	17,538.97	-0.7%	-0.7%	6.8%	20.1%	EGP/USD	30.90	0.0%	25.1%
India	17,660.15	-0.3%	-0.9%	1.7%	-2.5%	INR/USD	82.11	0.1%	-0.8%
Kenya	1,607.75	-0.03%	-0.4%	-0.9%	-4.1%	KES/USD	135.00	0.2%	9.3%
Nigeria	1,835.28	0.2%	-1.3%	-5.1%	-0.4%	NGN/USD	465.00	1.0%	3.8%
Saudi Arabia	11,163.57	0.0%	1.8%	5.4%	6.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,676.50	0.9%	0.7%	4.5%	10.0%	ZAR/USD	18.17	-0.7%	6.8%
Vietnam	1,064.55	-0.04%	0.1%	-0.9%	5.9%	VND/USD	23,515.00	0.0%	-0.5%

## MSCI Emerging Markets

MSCI Frontier	481.08	0.3%	-0.3%	-0.6%	1.9%	Brent Crude (\$)	84.77	0.01%	-1.3%
MSCI Frontier 100	1,098.94	0.2%	-0.5%	-1.0%	0.8%	Gold (\$)	2,019.70	0.6%	10.6%
MSCI Emerging	1,000.55	-0.3%	0.01%	1.0%	4.6%	Copper (\$)	9,012.50	0.5%	7.7%
MSCI World (USD)	2,835.89	0.3%	0.4%	1.6%	9.0%	Coffee (\$)	185.15	0.8%	18.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	2.03	9.7%	79.6%	1634.96	International Breweries	4.45	-4.3%	-5.3%	3.42
Sterling	1.49	2.1%	6.4%	19.89	United Capital PLC	11.50	-2.1%	-17.9%	10.74
FBNH	10.45	1.5%	-4.1%	14.84	Ecobank	10.50	-0.9%	-0.9%	12.86
Nigerian Breweries	36.75	1.1%	-10.4%	13.78	Zenith	21.80	-0.9%	-9.2%	265.66
Fidelity	5.17	1.0%	18.9%	82.34	UBA	7.85	-0.6%	3.3%	102.07
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	3.65	3.65	0.0%	1.23	Cap	17.90	15.25	17.4%	0.55
Transnational Corporation	2.03	2.03	0.0%	1634.96	Unilever	12.65	10.50	20.5%	4.45
Total	218.80	218.80	0.0%	17.43	Custodian	5.65	4.55	24.2%	3.12
Seplat Petroleum	1150.00	1150.00	0.0%	2.72	Sterling	1.49	1.13	31.9%	19.89
P Z Cussons	11.60	11.60	0.0%	27.66	Guaranty	25.15	18.00	39.7%	294.58

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sharjah Cement and Industrial Development Co.	0.71	14.6%	-99.8%	0.36	National Corp for Tourism & Hotels	2.93	-4.9%	-99.3%	0.79
Hayah Insurance Company	1.00	7.3%	-99.8%	0.08	AGTHIA Group	4.30	-2.9%	-99.0%	1.13
FOODCO NATIONAL FOODSTUFF	1.70	6.3%	-99.6%	0.00	Gulf Pharmaceutical Industries	0.96	-2.4%	-99.8%	0.11
Methaq Takaful Insurance Compnay	0.74	5.7%	-99.8%	4.46	GHITHA HOLDING	40.24	-2.3%	-90.2%	12.27
Abu Dhabi National Co. for Building Materials	0.19	5.6%	-100.0%	0.05	Abu Dhabi Commercial Bank	8.64	-1.7%	-97.9%	23.79
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	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
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£)
Abu Dhabi Islamic Bank	21.39	10.0%	19.0%	37.44	Commercial International Bank	54.60	-6.7%	31.6%	279.89
Credit Agricole Egypt	10.02	6.7%	18.4%	24.17	Telecom Egypt	24.82	-3.8%	-1.1%	50.68
Abou Kir Fertilizers	48.72	6.2%	25.6%	52.89	Ibnsina Pharma	1.43	-1.7%	-33.8%	6.21
Oriental Weavers	16.53	6.0%	58.9%	42.93	Taaleem Management Services	3.10	-1.0%	-22.5%	0.86
Egyptian Kuwaiti Holding-EGP	43.99	5.5%	39.6%	23.00					
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	24.82	24.82	0.0%	50.68	Housing & Development Bank	10.28	10.28	0.0%	59.69
Sidi Kerir Petrochemicals	22.17	22.17	0.0%	85.96	Taaleem Management Services	3.10	2.72	14.0%	0.86
Oriental Weavers	16.53	16.53	0.0%	42.93	Cleopatra Hospital Company	4.44	3.81	16.5%	0.68
Orascom Construction	100.00	100.00	0.0%	6.66	Ibnsina Pharma	1.43	1.10	29.9%	6.21
Misir Fertilizers Production Company	175.93	175.93	0.0%	19.06	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.18	1.62	34.6%	2.62

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	3260.00	3.1%	-4.5%	2670.781	Power Grid Corp Of India	230.90	-2.4%	8.0%	2343.59
Hcl Technologies	1065.85	2.3%	2.6%	3899.11	Ultratech Cement	7595.00	-1.9%	9.1%	3354.12
Cipla	925.10	2.1%	-14.0%	1784.40	Adani Enterprises Ltd	1844.90	-1.8%	-52.2%	4739.29
Indusind Bank	1146.30	2.0%	-6.0%	5081.43	Apollo Hospitals Enterprise Ltd	4335.00	-1.2%	-3.2%	1771.08
Nestle India Limited	20585.20	1.7%	5.0%	2865.23	Titan Company	2575.00	-1.2%	-0.9%	1738.72
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	4915.00	4922.95	-0.2%	1759.83	Tata Consumer products ltd.	707.45	686.60	3.0%	940.54
ITC	398.50	402.00	-0.9%	3792.73	Wipro	366.95	352.00	4.2%	1459.29
Nestle India Limited	20585.20	21050.00	-2.2%	2865.23	Infosys	1259.00	1185.30	6.2%	15670.12
Bajaj Auto	4207.35	4311.00	-2.4%	989.30	Tata Consultancy Svs.	3130.60	2926.10	7.0%	8185.85
Hdfc Bank	1660.35	1720.00	-3.5%	24701.15	Reliance Industries	2340.40	2180.00	7.4%	11244.43

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	22.15	8.6%	-7.1%	0.12	Kenya Reinsurance Corporation Ltd	1.82	-6.2%	-0.5%	0.38
Nairobi Securities Exchange Plc	6.32	5.0%	-6.8%	0.01	Equity Group Holdings Plc	44.80	-1.2%	0.7%	2.39
WPP Scangroup Plc	2.87	2.5%	-4.7%	0.01	Safaricom Plc	16.85	-1.2%	-30.2%	38.02
KCB Group Plc	34.10	1.6%	-10.5%	3.76	Kengen Limited	2.36	-0.8%	-26.7%	0.17
NCBA Group Plc	37.95	1.2%	-3.6%	7.47	Absa Bank Kenya	12.55	-0.8%	2.0%	26.93
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	171.00	171.00	0.0%	1.56	Safaricom Plc	16.85	16.35	3.1%	38.02
Stanbic Holdings	111.50	114.00	-2.2%	0.20	WPP Scangroup Plc	2.87	2.77	3.6%	0.01
Absa Bank Kenya	12.55	12.95	-3.1%	26.93	Bamburi Cement Ltd	28.00	26.75	4.7%	0.43
NCBA Group Plc	37.95	40.00	-5.1%	7.47	Nairobi Securities Exchange Plc	6.32	6.02	5.0%	0.01
The Cooperative Bank of Kenya Ltd	13.10	14.00	-6.4%	4.72	Centum Investment Co.	8.50	8.00	6.3%	0.32

## 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

\*Market closed on 18/4

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum Ltd	114590.00	14.6%	-19.6%	84188.13	Capitec Bank Holdings Ltd	167000.00	-4.5%	-10.1%	146086.59
Sibanye Stillwater Ltd	4303.00	11.0%	-3.8%	121043.39	Aspen Pharmacare Holdings Ltd	17986.00	-2.4%	31.9%	19245.02
Northam Platinum Holdings Ltd	18153.00	10.4%	-3.0%	57908.07	Mr Price Group Ltd	14956.00	-2.3%	-5.9%	24976.52
Impala Platinum Holdings Ltd	18884.00	9.6%	-11.4%	121046.44	FirstRand Ltd	6220.00	-2.1%	0.1%	68046.80
Exxaro Resources Ltd	19511.00	3.8%	-10.2%	19120.78	Nedbank Group Ltd	20607.00	-1.8%	-3.1%	78512.67
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	40893.00	41225.00	-0.8%	32302.20	Clicks Group Ltd	25818.00	25227.00	2.3%	22230.07
Reinet Investments SCA	37516.00	38536.00	-2.6%	12487.95	Sasol Ltd	23929.00	22610.00	5.8%	56711.73
Anheuser-Busch InBev SA/NV	117180.00	121092.00	-3.2%	22375.52	Exxaro Resources Ltd	19511.00	17820.00	9.5%	19120.78
Bidvest Group Ltd/The	25004.00	27230.00	-8.2%	17939.37	Mr Price Group Ltd	14956.00	13450.00	11.2%	24976.52
NEPI Rockcastle NV	10768.00	11925.00	-9.7%	9545.19	Anglo American Platinum Ltd	114590.00	94530.00	21.2%	84188.13

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam National Petroleum Group	36800.00	1.9%	16.1%	18.094,02	Techcombank	29150.00	-1.0%	12.8%	74.366,35
Saigon Securities Inc	21750.00	1.9%	22.9%	409.807,02	Asia Commercial JS Bank	24750.00	-1.0%	13.0%	52.276,24
Vinamilk	73000.00	1.8%	-4.1%	67.367,85	Vietnam Prosperity	20250.00	-1.0%	13.1%	215.114,27
PetroVietnam Power Corp	13500.00	1.1%	26.8%	62.354,14	Tien Phong Commercial Joint Stock Bank	22800.00	-0.9%	8.3%	38.887,38
Saigon Beer Alcohol Beverage Corp.	165800.00	1.1%	-0.7%	29.751,88	Vietjet Aviation	99000.00	-0.6%	-9.6%	14.309,33
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietcombank	88000.00	96000.00	-8.3%	61.082,99	Vietnam Rubber Group	15500.00	15500.00	0.0%	25.670,37
Bank for Inv. and Devp	44600.00	49950.00	-10.7%	28.457,28	Mobile World Inv. Corp	39950.00	39950.00	0.0%	111.105,17
Asia Commercial JS Bank	24750.00	29080.00	-14.9%	52.276,24	No Va Land Invest	14850.00	14850.00	0.0%	389.069,65
Vinamilk	73000.00	87004.15	-16.1%	67.367,85	Phat Dat Real Estate Development Corp	13900.00	13900.00	0.0%	103.050,70
Saigon Beer Alcohol Beverage Corp.	165800.00	197900.00	-16.2%	29.751,88	Vingroup JSC	52800.00	52800.00	0.0%	92.365,54

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