

Daily Market Report

20 April 2023

JSE

JSE All-Share Index decreased by 0.63% and closed at 78,796.86 points on Wednesday, as the Resources and Financials sectors recorded losses.

BRVM

BRVM composite Index decreased by 0.38% and closed at 198.55 points on Wednesday, with Total Côte d'Ivoire and Nsia Banque Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index inched up by 0.08% to close at 51,178.41 points on Wednesday, as the Banking, Insurance, and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index was down by 0.13% and closed at 17,516.04 points on Wednesday, amid foreign selling.

ESG

Casablanca ESG 10 Index was up by 0.19% to close at 792.41 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.63%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.38%
NGX Nigerian Stock Exchange	▲	0.08%
EGX Egyptian Stock Exchange	▼	0.13%
ESG Casablanca Stock Exchange	▲	0.19%

African Markets

Nigeria: NGX 30 Index increased by 0.22% to close at 1,839.25 points on Wednesday. International Breweries and Sterling were the top gainers.

Egypt: EGX 30 Index was down by 0.13% and closed at 17,516.04 points on Wednesday, amid foreign selling.

Kenya: NSE 20 Index decreased by 0.32% and closed at 1,602.60 points on Wednesday. Total Kenya Ltd and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index decreased by 0.59% and closed at 73,243.31 points on Wednesday as the Resources and Financials sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	22.04%
Exchange Rate	₦ 461.03
INTERBANK RATES	
OPR	18.62 ↔
Overnight	19.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.04% to close at 9,633.78 points on Wednesday, as losses in the Telecommunications, Industrials, and Materials sectors pushed shares lower. MSCI UAE declined by 0.80% to close at 391.76 points.

Vietnam: VN-30 Index declined by 0.79% to close at 1,056.14 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.48% to close at 628.84 points.

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

India: Nifty 50 Index decreased by 0.23% to close at 17,618.75 points on Wednesday, as losses in the IT, Media, and Bank sectors pushed shares lower. MSCI India decreased by 0.36% to close at 1,944.40 points.

News

Nigeria:

FEC okays N142bn e-Customs project
FG, states, LGs share N714.629bn March FAAC revenue
FG approves N15bn NSITF infrastructure upgrade concession

Kenya:

Sanlam, NCBA unit trusts grow fastest as industry pot hits Sh161bn
Jubilee declares Sh870m dividend on the windfall from Allianz deals
Rich investors to buy extra shares without CMA approval

Abu Dhabi:

M42 acquires Bridgepoint's dialysis firm Diaverum in healthcare deal
UAE property developer DAMAC sells \$400m Islamic bond
Dubai Islamic Bank's profit jumps 11% on strong fee income

Saudi Arabia:

OPEC Fund, UNIDO boost cooperation in clean energy
Saudi holdings of US Treasuries edges up to \$111.7bn in Feb
MSMEs in Saudi Arabia receive \$61.4bn credit facilities

Egypt:

Egypt's agricultural exports up by 10% exceeding 2.5M tons since Jan
Egytrans to acquire 99.9% of NOSCO through share swap
Egypt's GDP grow to record 4% in FY2023/2024: BNP Paribas

South Africa:

Inflation quickens to 7.1%, as food prices continue to soar
Glencore dangles prospect of higher Teck bid before crucial vote
Anglo American sees return to glory days of copper production in Chile

India:

State-owned steel firms clear Rs 7,673.95-cr dues to MSMEs in FY23
Tata Comm Q4 profit dips about 11% to Rs 326 crore
IndusInd Bank inks \$100 mn agreement with JBIC through GIFT IBU

Vietnam:

Lộc Trời targets revenue of \$1 billion in 2023
Masan High-Tech Materials expect revenue up from 6% to 17%
Northern Thai Binh province seeks investment from RoK

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,633.78	-0.04%	0.1%	2.2%	-5.7%	AED/USD	3.67	0.0%	0.0%
Egypt	17,516.04	-0.1%	-0.9%	6.7%	20.0%	EGP/USD	30.90	0.0%	25.1%
India	17,618.75	-0.2%	-1.2%	1.5%	-2.7%	INR/USD	82.22	0.1%	-0.6%
Kenya	1,602.60	-0.3%	-0.7%	-1.2%	-4.4%	KES/USD	135.20	0.1%	9.5%
Nigeria	1,839.25	0.2%	-1.1%	-4.9%	-0.2%	NGN/USD	460.53	-1.0%	2.8%
Saudi Arabia	11,163.57	0.0%	1.8%	5.4%	6.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,243.31	-0.6%	0.1%	3.9%	9.4%	ZAR/USD	18.20	0.1%	6.9%
Vietnam	1,056.14	-0.8%	-0.7%	-1.6%	5.1%	VND/USD	23,492.50	-0.1%	-0.6%

MSCI Emerging Markets

MSCI Frontier	480.97	-0.02%	-0.3%	-0.6%	1.8%	Brent Crude (\$)	83.12	-1.9%	-3.2%
MSCI Frontier 100	1,097.98	-0.1%	-0.6%	-1.1%	0.7%	Gold (\$)	2,007.30	-0.6%	9.9%
MSCI Emerging	990.37	-1.0%	-1.0%	0.01%	3.6%	Copper (\$)	8,965.50	-0.5%	7.1%
MSCI World (USD)	2,833.39	-0.1%	0.3%	1.5%	8.9%	Coffee (\$)	187.29	1.2%	19.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	2.23	9.9%	97.3%	186.70	Nigerian Breweries	36.20	-1.5%	-11.7%	106.83
International Breweries	4.75	6.7%	1.1%	2.64	Lafarge Africa	23.40	-1.5%	-2.5%	48.76
Sterling	1.54	3.4%	10.0%	10.87	FCMB	3.47	-0.9%	-9.9%	2.48
Stanbic IBTC	35.60	3.2%	6.4%	126.86	Nascon	13.00	-0.8%	17.1%	6.82
P Z Cussons	11.90	2.6%	4.8%	7.41					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.70	3.70	0.0%	4.51	Cap	17.90	15.25	17.4%	0.97
Transnational Corporation	2.23	2.23	0.0%	186.70	Unilever	12.65	10.50	20.5%	1.37
Total	218.80	218.80	0.0%	6.90	Custodian	5.65	4.55	24.2%	0.56
Seplat Petroleum	1115.30	1115.30	0.0%	1.40	Sterling	1.54	1.13	36.3%	10.87
P Z Cussons	11.90	11.90	0.0%	7.41	Guaranty	25.15	18.00	39.7%	379.99

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Commercial Bank International	0.68	7.9%	-99.8%	0.05	Abu Dhabi National Co. for Building Materials	0.17	-10.0%	-100.0%	0.13
Bank of Sharjah	0.43	4.6%	-99.9%	0.20	Fertiglobe plc	3.83	-9.2%	-99.1%	84.67
Gulf Cement Co.	0.42	3.5%	-99.9%	0.00	Hayah Insurance Co.	0.91	-8.7%	-99.8%	0.14
ADNOC Drilling Company PJSC	3.90	3.5%	-99.0%	21.70	FOODCO NATIONAL FOODSTUFF	1.60	-5.9%	-99.6%	0.00
Gulf Pharmaceutical Industries	0.98	2.4%	-99.8%	0.39	ESG EMIRATES STALLIONS GROUP	5.00	-3.7%	-98.8%	9.48
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£)
Taaleem Management Services	3.34	7.7%	-16.5%	7.36	Housing & Development Bank	9.95	-3.2%	-41.5%	46.14
E-finance For Digital and Financial Investments	19.20	5.2%	1.0%	74.64	Oriental Weavers	16.18	-2.1%	55.6%	24.42
GB AUTO	5.61	4.9%	4.7%	91.63	ELSWEDY ELECTRIC	17.13	-2.0%	42.8%	53.87
Edita Food Industries S.A.E	16.00	4.3%	15.2%	19.31	Commercial International Bank	53.60	-1.8%	29.2%	171.46
Cleopatra Hospital Company	4.61	3.8%	-13.3%	4.57	Abu Dhabi Islamic Bank- Egypt	21.19	-0.9%	60.3%	48.74
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	24.81	24.81	0.0%	19.59	Housing & Development Bank	9.95	9.95	0.0%	46.14
Sidi Kerir Petrochemicals	22.50	22.50	0.0%	42.08	Cleopatra Hospital Company	4.61	3.81	21.0%	4.57
Oriental Weavers	16.18	16.18	0.0%	24.42	Taaleem Management Services	3.34	2.72	22.8%	7.36
Orascom Construction PLC	102.01	102.01	0.0%	16.03	Ibsinsa Pharma	1.43	1.10	30.1%	3.91
Misir Fertilizers Production Company	176.00	176.00	0.0%	8.44	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.19	1.62	35.2%	6.83

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	342.80	2.4%	3.7%	1661.341	Hcl Technologies	1037.50	-2.5%	-0.2%	4515.81
Divi's Laboratories Limited	3334.70	2.0%	-2.3%	5783.95	Indusind Bank	1118.80	-2.5%	-8.3%	2491.17
Bajaj Auto	4265.00	1.3%	17.9%	1735.01	Infosys	1230.95	-2.3%	-18.4%	14000.27
Axis Bank	871.95	1.0%	-6.6%	20424.02	SBI Life Insurance	1123.00	-2.0%	-8.8%	1168.69
Mahindra & Mahindra	1215.45	0.9%	-2.7%	2206.30	NTPC	166.95	-1.9%	0.3%	2738.74
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	4910.05	4940.00	-0.6%	1889.59	Tata Consumer products ltd.	701.00	686.60	2.1%	865.72
ITC	398.20	402.00	-0.9%	3889.98	Wipro	361.25	352.00	2.6%	1356.70
Bajaj Auto	4265.00	4311.00	-1.1%	1735.01	Infosys	1230.95	1185.30	3.9%	14000.27
Nestle India Limited	20595.05	21050.00	-2.2%	1846.15	Tata Consultancy Svs.	3089.00	2926.10	5.6%	10219.39
HDFC	2743.00	2827.95	-3.0%	4814.95	Cipla	912.80	852.00	7.1%	1410.37

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	15.85	2.6%	-0.6%	0.07	Total Kenya Ltd	20.80	-6.1%	-12.8%	0.05
Diamond Trust Bank Limited	53.75	1.4%	7.5%	1.51	Nairobi Securities Exchange Plc	6.04	-4.4%	-10.9%	0.04
Stanbic Holdings	113.00	1.3%	10.8%	0.18	British American Tobacco Kenya Ltd	458.00	-3.0%	-0.4%	0.09
WPP Scangroup Plc	2.89	0.7%	-4.0%	0.08	East African Breweries Limited	165.00	-1.5%	-1.5%	1.35
Equity Group Holdings Plc	45.05	0.6%	1.2%	44.73	Safaricom Plc	16.70	-0.9%	-30.8%	80.61
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	171.00	-0.4%	9.09	Nairobi Securities Exchange Plc	6.04	6.02	0.3%	0.04
Stanbic Holdings	113.00	114.00	-0.9%	0.18	Safaricom Plc	16.70	16.35	2.1%	80.61
Absa Bank Kenya	12.45	12.95	-3.9%	2.13	WPP Scangroup Plc	2.89	2.77	4.3%	0.08
NCBA Group Plc	38.10	40.00	-4.8%	1.76	Bamburi Cement Limited	28.00	26.75	4.7%	0.17
The Cooperative Bank of Kenya Ltd	13.05	14.00	-6.8%	3.45	Centum Investment Co.	8.50	8.00	6.3%	0.05

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 19/4

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Reinet Investments SCA	39000.00	4.0%	19.1%	25759.11	AngloGold Ashanti Ltd	47462.00	-5.0%	44.2%	242056.20
British American Tobacco PLC	66220.00	3.7%	-1.8%	68868.80	Anglo American Platinum Ltd	110781.00	-3.3%	-22.3%	60922.90
Anheuser-Busch InBev SA/NV	119678.00	2.1%	16.9%	72277.13	Northam Platinum Holdings Ltd	17550.00	-3.3%	-6.2%	21762.00
Old Mutual Ltd	1150.00	1.9%	9.9%	25162.00	Absa Group Ltd	17611.00	-3.1%	-9.2%	48606.36
Investec PLC	9946.00	1.1%	-7.6%	19693.08	Gold Fields Ltd	27685.00	-2.9%	57.2%	137594.45
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)
Reinet Investments SCA	39000.00	39000.00	0.0%	25759.11	Clicks Group Ltd	25676.00	25227.00	1.8%	16057.77
Anheuser-Busch InBev SA/NV	119678.00	121092.00	-1.2%	72277.13	Sasol Ltd	23929.00	22610.00	5.8%	56711.73
Bid Corp Ltd	40525.00	41225.00	-1.7%	31794.70	Exxaro Resources Ltd	19385.00	17820.00	8.8%	24037.40
Bidvest Group Ltd	24758.00	27230.00	-9.1%	26986.22	Mr Price Group Ltd	14946.00	13450.00	11.1%	17038.44
NEPI Rockcastle NV	10617.00	11925.00	-11.0%	19641.45	Anglo American Platinum Ltd	110781.00	94530.00	17.2%	60922.90

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	170400.00	2.8%	2.1%	55.745,49	Vietnam Rubber Group	15050.00	-2.9%	9.1%	25.852,22
Mobile World Inv. Corp	40500.00	1.4%	-5.6%	120.133,50	Vietnam Prosperity	19700.00	-2.7%	10.1%	369.144,74
Vietjet Aviation	100100.00	1.1%	-8.6%	14.144,62	PetroVietnam Power Corp	13200.00	-2.2%	23.9%	75.313,30
Masan Group Corp	78700.00	0.6%	-15.4%	98.276,93	No Va Land Invest	14550.00	-2.0%	3.9%	507.860,10
Vietcombank	88500.00	0.6%	10.6%	36.838,37	Tien Phong Commercial Joint Stock Bank	22350.00	-2.0%	6.2%	42.030,44
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	88500.00	96000.00	-7.8%	36.838,37	BaoViet Holdings	46150.00	46150.00	0.0%	17.038,11
Bank for Inv. and Devp	44400.00	49950.00	-11.1%	20.065,53	Vietnam Rubber Group	15050.00	15050.00	0.0%	25.852,22
Saigon Beer Alcohol Beverage Corp.	170400.00	197900.00	-13.9%	55.745,49	Mobile World Inv. Corp	40500.00	40500.00	0.0%	120.133,50
Asia Commercial JS Bank	24400.00	29080.00	-16.1%	112.827,56	No Va Land Invest	14550.00	14550.00	0.0%	507.860,10
Vinamilk	72000.00	87004.15	-17.2%	58.981,43	Phat Dat Real Estate Development Corp	13700.00	13700.00	0.0%	143.366,24

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