

Daily Market Report

25 April 2023

JSE

JSE All-Share Index increased by 0.27% and closed at 78,121.37 points on Monday, as the Resources and Consumer Discretionary sectors recorded gains.

BRVM

BRVM composite Index inched up by 0.03% and closed at 197.75 points on Monday, with Total Senegal and BICI Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was closed on Monday on account of Eid-al-Fitr.

EGX

EGX 30 Index was closed on Monday on account of Eid-al-Fitr.

ESG

Casablanca ESG 10 Index was closed on Monday on account of Eid-al-Fitr.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.27%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.03%
NGX Nigerian Stock Exchange	↔	0.00%
EGX Egyptian Stock Exchange	↔	0.00%
ESG Casablanca Stock Exchange	↔	0.00%

African Markets

Nigeria: NGX 30 Index was closed on Monday on account of Eid-al-Fitr.

Egypt: EGX 30 Index was closed on Monday on account of Eid-al-Fitr.

Kenya: NSE 20 Index inched down by 0.02% and closed at 1,593.73 points on Monday. Standard Chartered Bank Kenya and British American Tobacco Kenya were the top losers.

South Africa: JSE Top 40 Index increased by 0.23% and closed at 72,510.19 points on Monday as the Resources and Consumer Discretionary sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	22.04%
Exchange Rate	₦ 461.03
INTERBANK RATES	
OPR	18.63 ↔
Overnight	19.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.21% to close at 9,654.22 points on Monday, as gains in the Health Care, Real Estate, and Energy sectors led shares higher. MSCI UAE jumped by 1.26% to close at 396.69 points.

Vietnam: VN-30 Index inched down by 0.001% to close at 1,046.17 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.39% to close at 619.90 points.

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

India: Nifty 50 Index increased by 0.68% to close at 17,743.40 points on Monday, as gains in the Bank, IT, and Financial Services sectors led shares higher. MSCI India increased by 0.57% to close at 1,953.19 points.

News

Nigeria:

Nigeria's indebtedness to World Bank now N6tn
Wema Bank grows gross earnings by 42.3% to N131.08bn
Insurance claims hit N1.5tn as confidence, awareness rise

Kenya:

CBK loans to banks up on liquidity crunch
Listed bonds turnover at NSE declines 14% in 1Q
Safaricom extends 5G coverage to 21 counties

Abu Dhabi:

UAE exempts firms focusing on welfare activities from corporate tax
UAE Islamic banks' gross assets rise to \$169bn by end of January
Multiply Group submits offer to buy stake in Media 247 for \$50m

Saudi Arabia:

ACWA Power gets \$174m loan for two Uzbekistan wind power projects
Saudi Arabia's Thiqah plans expansion to Egypt
Saudi Arabia climbs 17 places on the World Bank's logistics index

Egypt:

Suez Canal revenues records LE 22.7 bln last February: CAPMAS
IMF expects Egypt to contribute 1.7% to global growth
Egypt releases \$23 bln worth of imported goods since January

South Africa:

Sasol revises expected output of Natref lower
RBPlat's guidance remains unchanged
Oceana Group forecasts more than 100% rise in interim earnings

India:

IndusInd net profit rises 46% to Rs 2,043 crore
Adani Ports starts \$130 million buyback of debt securities
India's 10-year bond yield ends at 1-year low on policy pivo ..

Vietnam:

Three foreign groups plan to pour \$3.7 bn into Việt Nam
SCIC unveils first phase of 73 enterprise divestment plan for 2023
Techcombank sets target of US\$936.5 mn pre-tax profit this year

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,654.22	0.2%	0.2%	2.4%	-5.5%	AED/USD	3.67	0.0%	0.0%
Egypt	17,516.04	0.0%	0.0%	6.7%	20.0%	EGP/USD	30.90	1.0%	25.1%
India	17,743.40	0.7%	0.7%	2.2%	-2.0%	INR/USD	81.94	-0.1%	-1.0%
Kenya	1,593.73	-0.02%	-0.02%	-1.7%	-4.9%	KES/USD	135.50	1.0%	9.7%
Nigeria	1,848.93	0.0%	0.0%	-4.4%	0.3%	NGN/USD	460.53	0.0%	2.8%
Saudi Arabia	11,163.57	0.0%	0.0%	5.4%	6.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	72,510.19	0.2%	0.2%	2.9%	8.3%	ZAR/USD	18.14	0.3%	6.5%
Vietnam	1,046.17	-0.001%	-0.001%	-2.6%	4.1%	VND/USD	23,495.50	0.0%	-0.6%

MSCI Emerging Markets

MSCI Frontier	481.59	0.5%	0.5%	-0.4%	2.0%	Brent Crude (\$)	82.73	1.3%	-3.7%
MSCI Frontier 100	1,100.56	0.3%	0.3%	-0.8%	0.9%	Gold (\$)	1,999.80	0.5%	9.5%
MSCI Emerging	977.38	-0.3%	-0.3%	-1.3%	2.2%	Copper (\$)	8,730.50	-0.7%	4.3%
MSCI World (USD)	2,826.85	0.1%	0.1%	1.3%	8.6%	Coffee (\$)	179.72	-1.0%	15.1%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Access	9.90	10.0%	16.5%	1489.56	Lafarge Africa	23.00	-1.7%	-4.2%	90.41
Transnational Corporation	2.45	9.9%	116.8%	589.36	UACN	7.90	-1.3%	-22.9%	11.93
Fidelity	5.80	9.8%	33.3%	125.47	International Breweries	4.70	-1.1%	0.0%	7.89
FCMB	3.81	9.8%	-1.0%	8.34	UBA	7.85	-0.6%	3.3%	308.73
FBNH	11.20	7.2%	2.8%	31.03	Guaranty	25.00	-0.6%	8.7%	235.41
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%	8.24	Cap	17.90	15.25	17.4%	2.24
Transnational Corporation	2.45	2.45	0.0%	589.36	Unilever	12.65	10.50	20.5%	6.85
Total	218.80	218.80	0.0%	29.56	Custodian	5.65	4.55	24.2%	1.33
Seplat Petroleum	1115.30	1115.30	0.0%	109.57	Guaranty	25.00	18.00	38.9%	235.41
P Z Cussons	11.90	11.90	0.0%	7.06	Nestle	1080.30	764.90	41.2%	188.92

*Market closed on 24/4

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Co. for Building Materials	0.20	14.6%	7.1%	0.00	Sudatel Telecom Group Co Ltd	0.36	-9.9%	-22.6%	0.89
Hayah Insurance Company	0.96	5.9%	-0.6%	0.04	MBME GROUP Private Joint Stock Company	11.90	-8.5%	-3.3%	0.04
ESHRAQ INVESTMENTS	0.51	5.0%	4.1%	14.47	The National Bank of Ras Al Khaimah	4.95	-4.8%	5.3%	0.38
Easy Lease Motorcycle Rental	31.50	3.3%	-9.5%	12.34	Bank of Sharjah	0.41	-4.4%	-14.6%	0.66
ADNOC Gas plc	3.15	2.9%	12.1%	106.07	National Corp for Tourism & Hotels	2.90	-3.3%	-3.3%	0.16
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	MBME GROUP Private Joint Stock Company	11.90	11.90	0.0%	0.04
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	Sawaheed 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£)
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

*Market closed on 24/4

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HDFC Life Insurance Company Ltd	546.15	6.4%	-3.5%	12765.821	Dr Reddys Lab	4802.00	-1.4%	13.3%	2097.16
Tata Consumer products ltd.	734.50	4.9%	-4.2%	4357.58	Indusind Bank	1101.35	-1.3%	-9.7%	8608.11
Wipro	377.95	2.7%	-3.8%	3330.46	Cipla	904.50	-1.2%	-15.9%	1614.18
Axis Bank	884.25	2.3%	-5.3%	15902.40	Divi's Laboratories Ltd	3195.00	-1.1%	-6.4%	950.52
Icici Bank	905.30	2.2%	1.6%	27837.66	Maruti Suzuki India	8472.00	-1.0%	0.9%	4608.99
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	4340.00	4354.95	-0.3%	1210.61	Infosys	1228.85	1185.30	3.7%	10169.57
ITC	408.30	410.00	-0.4%	2433.08	Cipla	904.50	852.00	6.2%	1614.18
HDFC	2787.00	2827.95	-1.4%	7757.51	Tech Mahindra	1006.00	943.70	6.6%	1625.99
Hdfc Bank	1689.50	1720.00	-1.8%	29988.94	Tata Consumer products ltd.	734.50	686.60	7.0%	4357.58
Dr Reddys Lab	4802.00	4940.00	-2.8%	2097.16	SBI Life Insurance	1106.50	1033.20	7.1%	1471.40

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	21.95	7.9%	-8.0%	0.04	Standard Chartered Bank Kenya Ltd	154.00	-9.4%	7.9%	1.62
Nation Media Group	16.00	6.3%	0.3%	0.03	British American Tobacco Kenya Ltd	460.00	-2.1%	0.0%	0.32
East African Breweries Limited	164.75	4.1%	-1.6%	13.20	WPP Scangroup Plc	2.70	-1.8%	-10.3%	0.02
NCBA Group Plc	40.00	2.6%	1.7%	80.79	Kenya Reinsurance Corporation Ltd	1.82	-0.5%	-0.5%	0.14
Bamburi Cement Limited	28.40	1.6%	-9.8%	0.05	Kengen Limited	2.35	-0.4%	-27.0%	0.76
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)
NCBA Group Plc	40.00	40.00	0.0%	80.79	Nairobi Securities Exchange	6.00	6.00	0.0%	0.47
Stanbic Holdings	114.25	114.50	-0.2%	0.02	WPP Scangroup	2.70	2.70	0.0%	0.02
Absa Bank Kenya	12.30	12.95	-5.0%	3.36	Safaricom	16.70	16.35	2.1%	13.40
The Cooperative Bank of Kenya Ltd	13.15	14.00	-6.1%	0.79	Bamburi Cement Ltd	28.40	26.75	6.2%	0.05
Standard Chartered Bank Kenya Ltd	154.00	171.00	-9.9%	1.62	Centum Investment Company	8.74	8.00	9.3%	0.09

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 24/4

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
AngloGold Ashanti Ltd	49051.00	2.4%	49.0%	80443.64	Prosus NV	134261.00	-2.1%	14.0%	55708.92
Anheuser-Busch InBev SA/NV	120540.00	1.9%	17.7%	28567.98	Naspers Ltd	318073.00	-2.1%	12.6%	125746.98
Gold Fields Ltd	28400.00	1.8%	61.2%	97696.00	Northam Platinum Holdings Ltd	17500.00	-1.8%	-6.5%	36225.00
Clicks Group Ltd	26352.00	1.6%	-2.4%	18319.91	Capitec Bank Holdings Ltd	161229.00	-1.4%	-13.3%	59221.02
British American Tobacco	66400.00	1.4%	-1.5%	33279.02	Anglo American	56775.00	-1.2%	-14.4%	55639.50
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	39300.00	39645.00	-0.9%	4369.77	Sasol Ltd	23137.00	22610.00	2.3%	38870.16
Bid Corp Ltd	41108.00	41225.00	-0.3%	20267.48	Clicks Group Ltd	26352.00	25227.00	4.5%	18319.91
Anheuser-Busch InBev SA/NV	120540.00	121092.00	-0.5%	28567.98	Exxaro Resources Ltd	19209.00	17820.00	7.8%	18056.46
Bidvest Group Ltd	24855.00	27230.00	-8.7%	16822.61	Mr Price Group Ltd	14923.00	13450.00	11.0%	16713.76
NEPI Rockcastle NV	10658.00	11925.00	-10.6%	12363.28	Anglo American Platinum Ltd	110029.00	94530.00	16.4%	54060.55

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
No Va Land Invest	14050.00	3.3%	0.4%	300.506,13	Masan Group Corp	73300.00	-4.1%	-21.2%	118.726,26
Techcombank	29500.00	2.8%	14.1%	102.157,57	Petrovietnam Gas	93100.00	-2.4%	-8.3%	53.287,49
PetroVietnam Power Corp	13000.00	1.6%	22.1%	40.853,70	Mobile World Inv. Corp	38400.00	-2.3%	-10.5%	123.624,54
Phat Dat Real Estate Development Corp	13200.00	1.5%	-2.9%	54.303,99	BaoViet Holdings	46400.00	-1.0%	-0.4%	6.806,23
Tien Phong Commercial Joint Stock Bank	22850.00	1.3%	8.6%	109.279,64	Saigon Securities Inc	21500.00	-0.7%	21.5%	208.828,50
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	87900.00	96000.00	-8.4%	44.352,10	BaoViet Holdings	46400.00	46400.00	0.0%	6.806,23
Bank for Inv. and Devp	43700.00	49950.00	-12.5%	20.346,45	Vietnam Rubber Group	15300.00	15300.00	0.0%	11.505,42
Saigon Beer Alcohol Beverage Corp.	171100.00	197900.00	-13.5%	21.625,83	Masan Group Corp	73300.00	73300.00	0.0%	118.726,26
Asia Commercial JS Bank	24200.00	29080.00	-16.8%	55.109,05	Mobile World Inv. Corp	38400.00	38400.00	0.0%	123.624,54
Vinamilk	70500.00	87004.15	-19.0%	80.136,57	No Va Land Invest	14050.00	14050.00	0.0%	300.506,13

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