

Daily Market Report

5 April 2023

JSE

JSE All-Share Index jumped by 1.10% and closed at 77,458.58 points on Tuesday, as the Resources and Industrial sectors recorded gains.

BRVM

BRVM composite Index decreased by 0.04% and closed at 199.95 points on Tuesday, with Tractafric Motors Côte d'Ivoire and Coris Bank International being the top losers.

NSE

NGX All-Share Index decreased by 0.27% to close at 54,035.39 points on Tuesday, as the Banking and Industrials sectors recorded losses.

EGX

EGX 30 Index decreased by 0.34% and closed at 16,998.35 points on Tuesday, as the market lost LE 1.24 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.27% to close at 793.22 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.10%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.04%
NGX Nigerian Stock Exchange	▼	0.27%
EGX Egyptian Stock Exchange	▼	0.34%
ESG Casablanca Stock Exchange	▼	0.27%

African Markets

Nigeria: NGX 30 Index decreased by 0.28% to close at 1925.09 points on Tuesday. FCMB and Guaranty were the top losers.

Egypt: EGX 30 Index decreased by 0.34% and closed at 16,998.35 points on Tuesday, as the market lost LE 1.24 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased marginally by 0.03% and closed at 1,632.24 points on Tuesday. Kengen Limited and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index jumped by 1.04% and closed at 71,693.25 points on Tuesday as the Resources and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.86
INTERBANK RATES	
OPR	18.75 ▲
Overnight	18.62 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched up by 0.03% to close at 9,504.12 points on Tuesday, as gains in the Telecommunications, Real Estate, and Financials sectors led shares higher. MSCI UAE increased by 0.26% to close at 383.13 points.

Vietnam: VN-30 Index decreased marginally by 0.04% to close at 1,088.34 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.37% to close at 645.93 points.

Saudi Arabia: Tadawul All Share Index climbed by 1.31% to close at 10,948.60 points on Tuesday, as gains in the Transportation, Software & Services, and Consumer Durables & Apparel sectors led shares higher. MSCI Saudi Arabia climbed by 1.50% and closed at 1,493.72 points.

India: Nifty 50 Index was closed on Tuesday on account of Mahavir Jayanti.

News

Nigeria:

NGX records N318.52bn listings in Q1
FG implements 180 ease of doing business reforms
AfDB approves \$525,000 grant for African fintech firms

Kenya:

Interbank loan rates rise to 7.9pc over tight liquidity
Nairobi own source revenue grows 17pc
Imperial Bank depositors to get Sh2 billion

Abu Dhabi:

Abu Dhabi's AD Ports signs \$2 bln syndicated bank facility
DIFC: Dubai lures finance giants to \$8tn wealth market
Abu Dhabi sees 40% drop in labour dispute cases

Saudi Arabia:

Saudi business activity in March keeps up the momentum: PMI
Saudi Electricity completes issuance of two sukuk tranches valued at \$2bn
Over 37k Certificates of Origin issued in March 2023 in exports boost

Egypt:

Egypt's non-oil private sector PMI drops slightly in March
EFG Hermes thumps up to capital increase
CIB offers 3-year 22%-yield CDs

South Africa:

Anglo explores green steel with Swedish company
Murray & Roberts completes R1.26bn disposal of Gautrain stake
Industrials REIT receives buyout offer from Blackstone

India:

HDFC Ltd records 12% loan growth in March quarter
Windfall tax on crude nil, export levy on diesel halved
World Bank lowers India current fiscal year growth forecast to 6.3%

Vietnam:

CPI increases 4.18% in Q1
Retail sales of goods and services rise 14 per cent in Q1
Vietnam's economic growth to reach 6.5% this year: ADB

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,504.12	0.03%	0.8%	0.8%	-6.9%	AED/USD	3.67	0.0%	0.0%
Egypt	16,998.35	-0.3%	3.5%	3.5%	16.4%	EGP/USD	30.90	0.0%	25.1%
India	17,398.05	0.0%	0.2%	0.2%	-3.9%	INR/USD	82.11	-0.1%	-0.8%
Kenya	1,632.24	0.03%	0.6%	0.6%	-2.6%	KES/USD	133.05	0.2%	7.7%
Nigeria	1,925.09	-0.3%	-0.4%	-0.4%	4.5%	NGN/USD	464.50	0.9%	3.7%
Saudi Arabia	10,948.60	1.3%	3.4%	3.4%	4.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,693.25	1.0%	1.7%	1.7%	7.1%	ZAR/USD	17.93	0.5%	5.4%
Vietnam	1,088.34	0.04%	1.4%	1.4%	8.3%	VND/USD	23,467.50	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	486.14	0.2%	0.5%	0.5%	2.9%	Brent Crude (\$)	84.94	0.01%	-1.1%
MSCI Frontier 100	1,117.08	0.2%	0.6%	0.6%	2.4%	Gold (\$)	2,022.20	1.9%	10.7%
MSCI Emerging	987.62	-0.2%	-0.3%	-0.3%	3.3%	Copper (\$)	8,751.00	-1.9%	4.5%
MSCI World (USD)	2,796.78	-0.2%	0.2%	0.2%	7.5%	Coffee (\$)	168.87	2.1%	8.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	2.20	5.3%	10.0%	67.90	FCMB	4.00	-3.6%	3.9%	6.20
Dangote Sugar	17.50	2.9%	9.0%	29.99	Guaranty	24.60	-3.1%	7.0%	338.71
P Z Cussons	11.00	1.9%	-3.1%	5.45	Ecobank	10.60	-2.8%	0.0%	3.15
Transnational Corporation	1.40	1.4%	23.9%	42.08	Zenith	25.15	-2.5%	4.8%	373.78
					International Breweries	4.10	-2.4%	-12.8%	8.07
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	4.00	4.00	0.0%	6.20	Cap	17.90	15.25	17.4%	1.79
Wema	4.00	4.00	0.0%	1.28	Custodian	5.65	4.55	24.2%	1.24
Transnational Corporation	1.40	1.40	0.0%	42.08	Unilever	13.50	10.50	28.6%	2.39
Total	218.80	218.80	0.0%	12.43	Sterling	1.54	1.13	36.3%	1.09
Seplat Petroleum	1150.00	1150.00	0.0%	336.67	Guaranty	24.60	18.00	36.7%	338.71

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easy Lease Motorcycle Rental	27.80	6.9%	-93.2%	10.41	Sudatel Telecom Group Company Ltd	0.42	-5.2%	-99.9%	0.61
PALMS SPORTS	10.36	5.6%	-97.5%	5.05	GFH Financial Group	0.90	-5.1%	-99.8%	1.59
Borouge	2.66	3.9%	-99.4%	85.42	Bank of Sharjah	0.36	-4.0%	-99.9%	0.09
ESG EMIRATES STALLIONS GROUP	4.94	2.9%	-98.8%	8.86	Abu Dhabi National Hotels Co.	4.54	-3.0%	-98.9%	0.46
National Corporation for Tourism & Hotels	2.70	2.7%	-99.3%	0.24	BURJEEL HOLDINGS	2.23	-2.6%	-99.5%	20.73
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£)
Medinet Nasr Housing	3.44	6.5%	5.8%	88.71	Sidi Kerir Petrochemicals	20.50	-2.8%	56.3%	66.80
Tenth Of Ramadan Pharma Ind. & Diagnostic	2.19	4.8%	-26.3%	19.89	Eastern Company	17.00	-2.7%	18.8%	8.15
Credit Agricole Egypt	9.30	4.6%	9.9%	14.99	Alexandria Mineral Oils Company	9.38	-2.5%	48.4%	19.18
T M G Holding	9.11	3.4%	-8.8%	62.89	E-finance For Digital and Financial Investments	17.66	-1.8%	-7.1%	6.98
Abu Dhabi Islamic Bank- Egypt	20.00	3.2%	11.3%	24.53	Abou Kir Fertilizers	46.87	-1.4%	11.3%	24.53
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	24.92	24.92	0.0%	23.60	Housing & Development Bank	9.58	9.58	0.0%	53.92
Sidi Kerir Petrochemicals	20.50	20.50	0.0%	66.80	Taaleem Management Services	3.21	2.72	18.0%	2.82
Oriental Weavers	14.29	14.29	0.0%	31.19	Cleopatra Hospital Co.	4.51	3.81	18.4%	2.83
Orascom Construction	100.01	100.01	0.0%	4.83	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.19	1.62	35.2%	19.89
Misir Fertilizers Production Co.	161.40	161.40	0.0%	8.31	Ibsina Pharma	1.52	1.10	38.4%	10.23

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	2429.00	3.5%	-11.3%	1903.493	Bharat Petroleum	330.25	-4.1%	-0.1%	3131.55
Coal India	220.30	3.1%	-2.1%	1691.86	Adani Enterprises Ltd	1718.00	-1.9%	-55.5%	5918.46
Bajaj Auto	3989.90	2.7%	10.3%	1974.15	Apollo Hospitals Enterprise Ltd	4233.00	-1.8%	-5.5%	2101.42
Maruti Suzuki India	8508.00	2.6%	1.4%	5332.38	Infosys	1410.00	-1.3%	-6.5%	7406.14
Divi's Laboratories Limited	2880.00	2.0%	-15.6%	647.47	ITC	379.20	-1.1%	14.4%	2684.54
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	4663.35	4682.00	-0.4%	1393.43	Wipro	368.20	355.00	3.7%	743.94
Ultratech Cement	7643.00	7737.00	-1.2%	2759.08	Infosys	1410.00	1355.00	4.1%	7406.14
NTPC	177.90	182.95	-2.8%	1614.38	Tata Consumer products ltd.	716.95	686.60	4.4%	570.15
Bajaj Auto	3989.90	4131.75	-3.4%	1974.15	Cipla	891.15	852.00	4.6%	2341.03
Larsen & Toubro	2169.00	2297.65	-5.6%	2673.28	Divi's Laboratories Ltd	2880.00	2730.00	5.5%	647.47

*Market Closed on 4/4

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
KenGen Limited	2.38	4.4%	-26.1%	0.47	Centum Investment Company	8.68	-2.9%	3.8%	0.21
Nairobi Securities Exchange Plc	6.46	3.9%	-4.7%	0.05	Bamburi Cement Ltd	27.95	-1.9%	-11.3%	0.18
Diamond Trust Bank Limited	54.00	1.5%	8.0%	0.31	Total Kenya Ltd	21.65	-1.6%	-9.2%	0.18
Stanbic Holdings	111.25	1.1%	9.1%	3.46	WPP Scangroup Plc	2.77	-1.1%	-8.0%	0.08
Kenya Reinsurance Corporation Ltd	1.93	0.5%	5.5%	1.02	Equity Group Holdings Plc	45.50	-1.0%	2.2%	80.49
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	169.50	170.00	-0.3%	0.63	WPP Scangroup Plc	2.77	2.77	0.0%	0.08
Absa Bank Kenya	12.90	12.95	-0.4%	0.47	Bamburi Cement Ltd	27.95	26.75	4.5%	0.18
Stanbic Holdings	111.25	114.00	-2.4%	3.46	Nairobi Securities Exchange	6.46	6.02	7.3%	0.05
The Cooperative Bank of Kenya Ltd	13.15	14.00	-6.1%	5.90	Centum Investment Company	8.68	8.00	8.5%	0.21
NCBA Group Plc	36.35	40.00	-9.1%	0.49	Safaricom	18.00	16.35	10.1%	257.32

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tihama Advertising and Public Relations Co.	20.04	10.0%	-70.1%	1.10	National Agricultural Development Co.	27.90	-3.8%	36.6%	73.97
Al-Baha Investment and Development Co.	14.66	9.9%	27.5%	30.70	Arabian Contracting Services Co.	121.40	-2.1%	13.5%	18.62
Saudi Marketing Co.	25.20	9.9%	38.5%	34.48	Lazurde Company for Jewelry	14.00	-2.0%	13.5%	13.01
Rabigh Refining and Petrochemical Co.	11.02	5.8%	3.2%	106.74	Saudi Re for Cooperative Reinsurance Co.	15.82	-1.9%	15.5%	7.13
Mobile Telecommunication Company Saudi Arabia	13.98	5.4%	39.0%	335.52	Ash-Sharqiyah Development Co.	58.40	-1.9%	18.0%	35.47
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	55.60	55.60	0.0%	75.98	Al Alamiya for Coop Insurance Co.	12.60	12.60	0.0%	1.99
Riyadh Cables Group Co.	52.40	52.40	0.0%	15.38	Alkhabeer REIT Fund	6.67	6.67	0.0%	2.59
Alamar Foods Co.	145.60	145.60	0.0%	11.09	Allied Cooperative Insurance Group	11.48	11.48	0.0%	0.82
Nahdi Medical Co.	184.00	184.00	0.0%	24.53	Arabian Centres Co.	21.86	18.70	0.0%	26.26
Scientific and Medical Equipment House Co.	68.80	68.80	0.0%	20.80	Fawaz Abdulaziz Alhokair Co.	0.00	0.00	0.0%	0.00

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	100372.00	4.8%	-29.6%	32373.98	Sanlam Ltd	5498.00	-3.5%	12.8%	20177.66
Gold Fields Ltd	25099.00	4.5%	42.5%	108427.68	Standard Bank Group Ltd	17145.00	-2.0%	2.2%	51092.10
AngloGold Ashanti Ltd	45444.00	3.8%	38.0%	104975.64	BHP Group Ltd	54794.00	-1.8%	4.0%	62465.16
Sibanye Stillwater Ltd	3786.00	3.6%	20.9%	51754.62	MTN Group Ltd	12702.00	-1.1%	-0.2%	49029.72
Northam Platinum Holdings Ltd	15101.00	3.5%	-19.3%	13518.11	Anglo American PLC	59100.00	-0.3%	-10.9%	62055.00
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)
Anheuser-Busch InBev SA/NV	120127.00	120127.00	0.0%	38827.45	Clicks Group Ltd	26040.00	25227.00	3.2%	6974.03
Bid Corp Ltd	40598.00	41225.00	-1.5%	17265.52	Anglo American Platinum Ltd	100372.00	94753.00	5.9%	32373.98
Reinet Investments SCA	37828.00	38536.00	-1.8%	10014.96	Exxaro Resources Ltd	19470.00	17820.00	9.3%	25116.30
Bidvest Group Ltd	25817.00	27230.00	-5.2%	16130.20	Mr Price Group Ltd	14799.00	13450.00	10.0%	7409.86
NEPI Rockcastle NV	10400.00	11925.00	-12.8%	15288.00	Sasol Ltd	25473.00	22610.00	12.7%	44577.75

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Securities Inc	22500.00	2.3%	27.1%	688.569,19	Vinhomes	51000.00	-3.0%	6.3%	78.436,17
PetroVietnam Power Corp	13500.00	2.3%	26.8%	157.088,53	Vingroup JSC	56800.00	-2.1%	5.6%	107.586,92
Masan Group Corp	78400.00	2.1%	-15.7%	102.549,03	Saigon Beer Alcohol Beverage Corp.	178000.00	-1.7%	6.7%	29.508,55
Mobile World Inv. Corp	39800.00	2.1%	-7.2%	124.141,72	Ho Chi Minh City Devp	19150.00	-1.0%	20.1%	43.069,90
Viet Nam International Commercial Joint Stock Bank	22100.00	1.8%	16.3%	165.892,81	Vietnam JSC Bank	29650.00	-1.0%	8.8%	65.878,28
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	92000.00	96000.00	-4.2%	24.874,30	Vietnam Rubber Group	15950.00	15950.00	0.0%	47.040,92
Bank for Inv. and Devp	46000.00	49950.00	-7.9%	40.783,16	Mobile World Inv. Corp	39800.00	39800.00	0.0%	124.141,72
Saigon Beer Alcohol Beverage Corp.	178000.00	197900.00	-10.1%	29.508,55	No Va Land Invest	12750.00	12750.00	0.0%	212.131,69
Asia Commercial JS Bank	25150.00	29080.00	-13.5%	180.831,54	Phat Dat Real Estate Development Corp	13150.00	13150.00	0.0%	102.152,88
Vinamilk	74200.00	87004.15	-14.7%	135.220,15	Vietjet Aviation	102000.00	102000.00	0.0%	31.787,01

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