

Daily Market Report

6 April 2023

JSE

JSE All-Share Index declined by 1.04% and closed at 76,656.44 points on Wednesday, as the Resources and Financial sectors recorded losses.

BRVM

BRVM composite Index decreased by 0.29% and closed at 199.37 points on Wednesday, with CFAO Motors Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index dropped by 1.88% to close at 53,018.97 points on Wednesday, as the Consumer Goods sector recorded losses.

EGX

EGX 30 Index was up by 0.12% and closed at 17,019.25 points on Wednesday, as the market gained LE 1.086 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.33% to close at 795.83 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	1.04%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.29%
NGX Nigerian Stock Exchange	▼	1.88%
EGX Egyptian Stock Exchange	▲	0.12%
ESG Casablanca Stock Exchange	▲	0.33%

African Markets

Nigeria: NGX 30 Index dropped by 1.74% to close at 1891.53 points on Wednesday. Flour Mills and FCMB were the top losers.

Egypt: EGX 30 Index was up by 0.12% and closed at 17,019.25 points on Wednesday, as the market gained LE 1.086 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index decreased by 0.45% and closed at 1,624.92 points on Wednesday. Nairobi Securities Exchange and British American Tobacco Kenya Ltd were the top losers.

South Africa: JSE Top 40 Index declined by 1.07% and closed at 70,925.81 points on Wednesday as the Resources and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.91%
Exchange Rate	₦ 460.86
INTERBANK RATES	
OPR	18.63 ↔
Overnight	19.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index was down by 0.10% to close at 9,494.98 points on Wednesday, as losses in the Telecommunications, Health Care, and Financials sectors pushed shares lower. MSCI UAE decreased by 0.39% to close at 381.99 points.

Vietnam: VN-30 Index was up by 0.14% to close at 1,089.83 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.30% to close at 647.89 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.26% to close at 10,920.63 points on Wednesday, as losses in the Health Care Equipment & Svc, Software & Services, and Pharma, Biotech & Life Science sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.36% and closed at 1,488.37 points.

India: Nifty 50 Index increased by 0.91% to close at 17,557.05 points on Wednesday, as gains in the IT, Bank and FMCG sectors led shares higher. MSCI India increased by 0.67% to close at 1,937.15 points.

News

Nigeria:

UBA grows loan portfolio by N605bn
FMDQ Lists Dangote Industries Funding
N300bn Bonds
NCDMB launches N7bn pipe manufacturing plant

Kenya:

Kenya plots Sh79bn food reserve to cover 3-month stockouts
Banks enter full compliance with stricter capital rules
City Hall Revenue Rise by 17% to KES 4.5 Billion in Q3 2023

Abu Dhabi:

UAE non-oil activity bounces back and boosts job numbers
Abu Dhabi Islamic Bank's SME financing totalled Dh1 bn in 2022
Abu Dhabi's ADNOC seeks about \$1 billion in logistics unit IPO

Saudi Arabia:

Fitch upgrades Saudi Arabia's economy to A+
Saudi Arabia launches 80 factories worth \$1.1bn in Feb
Saudization rate in financial institutions at 77% in 4Q22

Egypt:

Egypt's foreign reserves increase \$95M by end of March
Egypt signs \$680M agreement to establish wind farm in Gulf of Suez
State-owned hotels' stake sale to be carried out via capital increase in USD

South Africa:

South African business activity contracts in March
Anglo American signs agreement to advance low-carbon steelmaking
Mortgage loan values declined in 4Q; set to fall further

India:

L&T wins contracts worth over Rs 7K cr for its hydrocarbon business
Adani Ports ends FY23 with 9% growth, largest port cargo volume ever
Govt gives approval for 34 electronic components mfg proposals

Vietnam:

GDP inches up 3.32% in Q1
Industrial production index fell in Q1
Autodesk & VC Group sign MoU to advance digitization in construction

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,494.98	-0.1%	0.7%	0.7%	-7.0%	AED/USD	3.67	0.0%	0.0%
Egypt	17,019.25	0.1%	3.7%	3.7%	16.6%	EGP/USD	30.91	0.0%	25.1%
India	17,557.05	0.9%	1.1%	1.1%	-3.0%	INR/USD	81.96	-0.2%	-1.0%
Kenya	1,624.92	-0.4%	0.2%	0.2%	-3.1%	KES/USD	133.40	0.3%	8.0%
Nigeria	1,891.53	-1.7%	-2.2%	-2.2%	2.7%	NGN/USD	464.50	0.0%	3.7%
Saudi Arabia	10,920.63	-0.3%	3.1%	3.1%	4.2%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,925.81	-1.1%	0.6%	0.6%	5.9%	ZAR/USD	18.04	0.6%	6.0%
Vietnam	1,089.83	0.1%	1.5%	1.5%	8.4%	VND/USD	23,467.50	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	484.33	-0.4%	0.1%	0.1%	2.5%	Brent Crude (\$)	84.99	0.1%	-1.1%
MSCI Frontier 100	1,113.84	-0.3%	0.4%	0.4%	2.1%	Gold (\$)	2,020.90	-0.1%	10.7%
MSCI Emerging	987.85	0.02%	-0.2%	-0.2%	3.3%	Copper (\$)	8,782.00	0.4%	4.9%
MSCI World (USD)	2,784.05	-0.5%	-0.3%	-0.3%	7.0%	Coffee (\$)	168.14	-0.4%	7.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Zenith	25.50	1.4%	6.3%	402.64	Airtel Africa	1331.10	-10.0%	-18.6%	536.80
Lafarge Africa	26.00	0.8%	8.3%	101.38	Flour Mills	29.50	-4.8%	3.9%	7.88
Guaranty	24.70	0.4%	7.4%	91.18	FCMB	3.85	-3.8%	0.0%	11.30
					Unilever	13.05	-3.3%	12.5%	2.89
					Transnational Corp	1.38	-1.4%	22.1%	44.30
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	4.00	4.00	0.0%	1.85	Cap	17.90	15.25	17.4%	0.29
Total	218.80	218.80	0.0%	19.63	Custodian	5.65	4.55	24.2%	28.39
Seplat Petroleum	1150.00	1150.00	0.0%	344.35	Unilever	13.05	10.50	24.3%	2.89
P Z Cussons	11.00	11.00	0.0%	1.81	Sterling	1.54	1.13	36.3%	1.09
Presco	150.80	150.80	0.0%	3.74	Guaranty	24.70	18.00	37.2%	91.18

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging Co.	23.00	15.0%	-94.4%	61.40	Aram Group	1.53	-10.0%	-99.6%	0.02
National Corporation for Tourism & Hotels	3.02	11.9%	-99.3%	4.43	FOODCO NATIONAL FOODSTUFF	2.03	-9.8%	-99.5%	0.00
Easy Lease Motorcycle Rental PJSC	30.00	7.9%	-92.7%	11.78	Methaq Takaful Insurance Compnay	0.54	-4.4%	-99.9%	0.13
GHITHA HOLDING P.J.S.C.	36.40	5.9%	-91.1%	6.08	Ras Al Khaimah Poultry & Feeding Co.	2.16	-4.0%	-99.5%	0.01
ESG EMIRATES STALLIONS GROUP P.J.S.C	5.23	5.9%	-98.7%	9.74	Gulf Pharmaceutical Industries	0.95	-3.5%	-99.8%	0.04
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	RAK Ceramics	2.57	2.57	0.0%	1.24
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	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£)
Tenth Of Ramadan Pharma Ind. & Diagnostic	2.30	5.0%	-22.6%	28.09	Palm Hills Development Co.	1.96	-2.6%	-0.2%	33.05
Juhayna Food Industries	11.69	3.6%	19.4%	45.44	Abu Dhabi Islamic Bank	19.52	-2.4%	8.6%	11.55
GB AUTO	5.45	3.0%	1.7%	68.30	Oriental Weavers	13.99	-2.1%	34.5%	17.18
Credit Agricole Egypt	9.51	2.3%	12.4%	21.22	Housing & Development Bank	9.38	-2.1%	-44.9%	25.30
Commercial International Bank	53.29	1.5%	28.5%	181.13	Alexandria Mineral Oils Company	9.19	-2.0%	-20.8%	5.07
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	24.50	24.50	0.0%	22.43	Housing & Development Bank	9.38	9.38	0.0%	25.30
Sidi Kerir Petrochemicals	20.40	20.40	0.0%	48.33	Cleopatra Hospital Co.	4.48	3.81	17.6%	1.30
Oriental Weavers	13.99	13.99	0.0%	17.18	Taaleem Management Services	3.20	2.72	17.6%	2.87
Orascom Construction PLC	99.00	99.00	0.0%	4.26	Ibnsina Pharma	1.52	1.10	37.6%	6.11
Misr Fertilizers Production Co.	159.61	159.61	0.0%	5.70	T M G Holding	9.02	6.50	38.8%	34.88

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Larsen & Toubro	2259.00	4.1%	8.3%	6170.728	Eicher Motors	2940.00	-2.1%	-8.9%	3047.02
HDFC	2707.00	3.0%	2.6%	15824.26	Mahindra & Mahindra	1154.05	-1.4%	-7.6%	2355.95
Hdfc Bank	1654.00	2.7%	1.6%	35712.05	Indusind Bank	1066.00	-1.2%	-12.6%	3181.16
ITC	387.00	2.1%	16.7%	4467.50	NTPC	176.00	-1.0%	5.7%	1908.02
HUL	2584.00	1.9%	0.9%	3805.78	Adani Enterprises Ltd	1701.50	-0.9%	-55.9%	6274.76
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	4679.95	4695.00	-0.3%	1705.63	Wipro	369.80	355.00	4.2%	1191.85
Ultratech Cement	7699.65	7737.00	-0.5%	1789.00	Infosys	1425.85	1355.00	5.2%	10659.97
Larsen & Toubro	2259.00	2297.65	-1.7%	6170.73	Cipla	897.00	852.00	5.3%	1439.87
ITC	387.00	394.00	-1.8%	4467.50	Divi's Laboratories Ltd	2885.00	2730.00	5.7%	655.14
NTPC	176.00	182.95	-3.8%	1908.02	Tata Consumer products ltd.	727.65	686.60	6.0%	686.11

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	2.00	3.6%	9.3%	7.62	Nairobi Securities Exchange Plc	6.04	-6.5%	-10.9%	1.93
NCBA Group Plc	37.50	3.2%	-4.7%	16.80	British American Tobacco Kenya Ltd	450.00	-2.6%	-2.2%	38.97
Kengen Limited	2.40	0.8%	-25.5%	0.61	East African Breweries Limited	167.25	-1.6%	-0.1%	0.84
Total Kenya Ltd	21.80	0.7%	-8.6%	0.15	Diamond Trust Bank Limited	53.50	-0.9%	7.0%	0.04
Kenya Power & Lighting Limited	1.56	0.6%	0.0%	0.16	Standard Chartered Bank Kenya Ltd	168.75	-0.4%	18.2%	6.80
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)
Absa Bank Kenya	12.95	12.95	0.0%	0.52	Nairobi Securities Exchange Plc	6.04	6.02	0.3%	1.93
Standard Chartered Bank Kenya Ltd	168.75	170.00	-0.7%	6.80	WPP Scangroup Plc	2.78	2.77	0.4%	0.01
Stanbic Holdings	111.50	114.00	-2.2%	1.78	Bamburi Cement Ltd	28.00	26.75	4.7%	0.86
NCBA Group Plc	37.50	40.00	-6.3%	16.80	Centum Investment Co.	8.66	8.00	8.3%	0.47
The Cooperative Bank of Kenya Ltd	13.10	14.00	-6.4%	1.53	Safaricom Plc	18.05	16.35	10.4%	434.64

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.	22.04	10.0%	-67.1%	0.64	Dr. Sulaiman Al Habib Medical Services Group	267.40	-5.2%	21.2%	160.54
Saudia Dairy and Foodstuff Co.	271.80	10.0%	25.8%	31.47	Arabian Internet and Communications Services Co.	272.80	-4.9%	12.4%	67.58
Halwani Bros. Co.	58.00	4.9%	30.9%	49.00	Arabian Centres Co.	20.92	-4.3%	9.9%	14.03
Middle East Specialized Cables Co.	11.72	4.1%	18.4%	26.53	Al-Baha Investment and Development Co.	14.06	-4.1%	22.3%	63.39
Saudi Enaya Cooperative Insurance Co.	10.32	3.7%	14.9%	71.60	Saudi Marketing Co.	24.20	-4.0%	33.0%	21.84
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	55.90	55.90	0.0%	64.33	Al Alamiya for Coop Insurance Co.	13.00	13.00	0.0%	3.68
Riyadh Cables Group Co.	50.70	50.70	0.0%	17.17	Alkhabeer REIT Fund	6.67	6.67	0.0%	1.77
Alamar Foods Co.	142.00	142.00	0.0%	4.82	Allied Cooperative Insurance Group	11.52	11.52	0.0%	2.86
Nahdi Medical Co.	178.80	178.80	0.0%	28.49	Arabian Centres Co.	20.92	18.70	0.0%	14.03
Scientific and Medical Equipment House Co.	68.50	68.50	0.0%	11.55	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)
AngloGold Ashanti Ltd	47760.00	5.1%	45.1%	160951.20	Anglo American Platinum Ltd	94530.00	-5.8%	-33.7%	29157.78
Gold Fields Ltd	26187.00	4.3%	48.7%	103700.52	Northam Platinum Holdings Ltd	14404.00	-4.6%	-23.0%	13395.72
Aspen Pharmacare Holdings Ltd	18632.00	1.0%	36.7%	27575.36	MultiChoice Group	11946.00	-4.5%	1.9%	23653.08
NEPI Rockcastle NV	10447.00	0.5%	20.9%	7588.49	Investec Ltd	9793.00	-3.5%	-8.9%	3928.07
MTN Group Ltd	12756.00	0.4%	0.2%	39543.60	Investec PLC	9859.00	-3.4%	-8.4%	14985.68
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	120364.00	120364.00	0.0%	29871.94	Anglo American Platinum Ltd	94530.00	94530.00	0.0%	29157.78
Bid Corp Ltd	40089.00	41225.00	-2.8%	17003.75	Clicks Group Ltd	25754.00	25227.00	2.1%	6032.36
Reinet Investments SCA	36883.00	38536.00	-4.3%	5815.34	Exxaro Resources Ltd	19029.00	17820.00	6.8%	75925.71
Bidvest Group Ltd/The	25438.00	27230.00	-6.6%	11787.71	Mr Price Group Ltd	14637.00	13450.00	8.8%	9200.09
NEPI Rockcastle NV	10447.00	11925.00	-12.4%	7588.49	Sasol Ltd	24657.00	22610.00	9.1%	29095.26

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Ho Chi Minh City Devp	19700.00	2.9%	23.5%	92.030,95	Sai Gon Thuong Tin Commercial	26250.00	-2.4%	16.7%	1.040.427,27
Vinhomes	52200.00	2.4%	8.7%	113.261,82	Vingroup JSC	55500.00	-2.3%	3.2%	109.779,60
Phat Dat Real Estate Development Corp	13400.00	1.9%	-1.5%	96.222,20	Bank for Inv. and Devp	45500.00	-1.1%	17.9%	62.322,64
Hoa Phat Group JSC	21500.00	1.9%	19.4%	540.571,64	Vietnam Prosperity	21200.00	-0.9%	18.4%	255.201,86
Vietnam Rubber Group JSC	16200.00	1.6%	17.4%	56.308,20	Saigon Beer Alcohol Beverage Corp.	176500.00	-0.8%	5.8%	29.615,53
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	92100.00	96000.00	-4.1%	30.768,14	Vietnam Rubber Group	16200.00	16200.00	0.0%	56.308,20
Bank for Inv. and Devp	45500.00	49950.00	-8.9%	62.322,64	Mobile World Inv. Corp	39750.00	39750.00	0.0%	68.838,25
Saigon Beer Alcohol Beverage Corp.	176500.00	197900.00	-10.8%	29.615,53	No Va Land Invest	12850.00	12850.00	0.0%	398.415,99
Asia Commercial JS Bank	25300.00	29080.00	-13.0%	83.573,53	Phat Dat Real Estate Development Corp	13400.00	13400.00	0.0%	96.222,20
Vinamilk	74500.00	87004.15	-14.4%	71.661,68	Vietjet Aviation	102900.00	102900.00	0.0%	21.164,17

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