

# Daily Market Report

2 May 2023

## JSE

JSE All-Share Index was closed on Monday on account of Worker's Day.

## BRVM

BRVM composite index was closed on Monday on account of Labour Day.

## NSE

NGX All-Share Index was closed on Monday on account of Worker's Day.

## EGX

EGX 30 Index fell by 2.02% and closed at 17,310.83 points on Monday, as the market lost LE 20 billion of market cap, amid Arab and foreign selling.

## ESG

Casablanca ESG 10 Index was closed on Monday on account of Labour Day.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	↔	0.00%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	↔	0.00%
<b>NGX</b> Nigerian Stock Exchange	↔	0.00%
<b>EGX</b> Egyptian Stock Exchange	▼	2.02%
<b>ESG</b> Casablanca Stock Exchange	↔	0.00%

## African Markets

**Nigeria:** NGX 30 Index was closed on Monday on account of Worker's Day.

**Egypt:** EGX 30 Index fell by 2.02% and closed at 17,310.83 points on Monday, as the market lost LE 20 billion of market cap, amid Arab and foreign selling.

**Kenya:** NSE 20 Index was closed on Monday on account of Labour Day.

**South Africa:** JSE Top 40 Index was closed on Monday on account of Worker's Day.

## Nigeria Key Indicators

	Current
Inflation	22.04%
Exchange Rate	₦ 460.87
<b>INTERBANK RATES</b>	
OPR	12.63 ↔
Overnight	13.13 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index declined by 0.87% to close at 9,704.42 points on Monday, as losses in the Industrials, Financials, and Real Estate sectors pushed shares lower. MSCI UAE dropped by 1.74% to close at 397.08 points.

**Vietnam:** VN-30 Index was closed on Monday on account of Labour Day.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.20% to close at 11,285.61 points on Monday, as losses in the Materials, Consumer Services, and Retailing sectors pushed shares lower. MSCI Saudi Arabia was up by 0.13% and closed at 1,521.24 points.

**India:** Nifty 50 Index was closed on Monday on account of Maharashtra Day.

## News

### Nigeria:

FG dumps five per cent telecom tax waiver  
Nigeria's Average Crude Oil Production Climbs 15% In 2023  
CBN: Credit To Private Sector Increased To N43.07trn In Q123

### Kenya:

Treasury bond yields surge exposes investors to losses  
StanChart cuts jobs for eighth straight year on automation  
NCBA picks new rate for foreign currency loans

### Abu Dhabi:

UAE's ADNOC signs \$1 bn LNG deal with TotalEnergies  
Abu Dhabi sets out plan to attract 24m visitors by end of 2023  
UAE's Eshraq to cross-list on Saudi Tadawul

### Saudi Arabia:

Saudi banks' aggregate profits surge 23% to \$1.98bn in March: SAMA  
Aramco-led consortium to set up first steel plate mfg plant in Kingdom  
Container volumes at Saudi ports rise 17.6% to 2m tons in Q1

### Egypt:

FRA grants licence to 1st gold investment fund in Egypt  
Egypt and Japan sign transport investment deal worth \$730m  
Egypt allocates \$980.3m to support exports in coming FY: PM

### South Africa:

Sasol awaits approval to sell cyanide business  
Mpac is upbeat over packaging prospects  
Industrials Reit reports higher passing rent despite economic downturn

### India:

GST collections surge 12% in April to a record Rs 1.87 lakh cr  
Manufacturing activity hits 4-month high in April  
To cut carbon footprint, NTPC plans 2 nuclear plants

### Vietnam:

April's consumer price index down 0.34% on month  
HDBank profit up 26 per cent, NPL ratio remains low  
PVI posts high revenue in 2022, pays 30% cash dividend

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,704.42	-0.9%	-0.9%	2.9%	-5.0%	AED/USD	3.67	0.0%	0.0%
Egypt	17,310.83	-2.0%	-3.4%	5.4%	18.6%	EGP/USD	31.05	1.5%	25.7%
India	18,065.00	0.0%	0.0%	4.1%	-0.2%	INR/USD	81.78	0.0%	-1.2%
Kenya	1,578.88	0.0%	0.0%	-2.7%	-5.8%	KES/USD	136.00	2.7%	10.1%
Nigeria	1,890.85	0.0%	0.0%	-2.2%	2.6%	NGN/USD	461.50	0.0%	3.0%
Saudi Arabia	11,285.61	-0.2%	0.1%	6.6%	7.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	72,582.82	0.0%	0.0%	3.0%	8.4%	ZAR/USD	18.40	0.3%	8.1%
Vietnam	1,051.43	0.0%	0.0%	-2.1%	4.6%	VND/USD	23,465.00	0.0%	-0.7%

## MSCI Emerging Markets

MSCI Frontier	483.40	-0.1%	-0.1%	-0.07%	2.3%	Brent Crude (\$)	79.31	-0.3%	-7.7%
MSCI Frontier 100	1,109.52	-0.1%	-0.1%	-0.04%	1.7%	Gold (\$)	1,992.20	-0.3%	9.1%
MSCI Emerging	976.74	-2.0%	-2.0%	-1.4%	2.1%	Copper (\$)	8,595.50	0.0%	2.7%
MSCI World (USD)	2,833.60	-0.1%	-0.1%	1.5%	8.9%	Coffee (\$)	176.00	-2.9%	12.7%

## STOCKS

### Nigeria\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Cadbury	13.50	9.8%	13.4%	62.81	Transnational Corporation	2.81	-9.9%	148.7%	231.16
Fidelity	5.67	9.0%	30.3%	291.45	Axamansard	2.37	-3.3%	18.5%	8.97
Dangote Sugar	19.50	5.7%	21.5%	106.93	Nigerian Breweries	32.00	-2.6%	-22.0%	221.33
Custodian	6.00	5.3%	0.8%	3.91	Sterling	1.60	-1.8%	14.3%	2.17
Flour Mills	31.00	4.4%	9.2%	13.77	FBNH	10.85	-1.4%	-0.5%	27.14
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	4.20	4.20	0.0%	1.50	Cap	18.50	15.25	21.3%	4.29
Wema	3.80	3.80	0.0%	16.66	Unilever	13.50	10.50	28.6%	0.23
Transnational Corporation	2.81	2.81	0.0%	231.16	Nigerian Breweries	32.00	24.40	31.1%	221.33
Total	217.50	217.50	0.0%	82.06	Custodian	6.00	4.55	31.9%	3.91
Seplat Petroleum	1115.30	1115.30	0.0%	1.02	Nestle	1043.80	764.90	36.5%	42.41

\*Market closed on 1/5

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Bayanat Al PLC	4.65	14.8%	-5.1%	36.84	Ras Al Khaimah Poultry & Feeding Co.	2.05	-9.3%	27.3%	0.05
Abu Dhabi National Co. for Building Materials	0.19	10.9%	6.0%	0.00	Sharjah Cement and Industrial Development Co.	0.62	-8.7%	1.0%	0.02
Aram Group	1.79	9.8%	-19.7%	0.00	Emirates Telecom. Group Company	23.20	-3.3%	1.5%	25.73
Presight Al Holding PLC	3.56	7.9%	9.5%	90.70	Multiply Group PJSC	3.25	-3.3%	-30.0%	103.18
AGTHIA Group	4.80	3.9%	20.6%	11.63	Al Dar Properties	5.24	-3.0%	18.3%	14.82
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 Company	210.00	210.00	0.0%	0.00	The National Investor PRJSC	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Union Insurance Co.	0.50	0.50	0.0%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Ras Alkhaima National Insurance Co.	4.50	4.50	0.0%	0.00	Sharjah Insurance Co.	1.50	1.50	0.0%	0.00

\*Market closed on 1/5

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Eastern Company	17.38	1.5%	21.5%	9.88	Alexandria Mineral Oils Company	9.39	-10.7%	48.6%	150.60
Ezz Steel	40.54	0.7%	74.4%	66.50	Abou Kir Fertilizers	47.37	-4.7%	22.1%	33.48
Abu Dhabi Islamic Bank- Egypt	21.08	0.4%	17.3%	12.54	QALA For Financial Investments	2.13	-4.5%	2.4%	97.50
					Egyptian Kuwaiti Holding-EGP	40.91	-4.4%	29.8%	15.10
					Telecom Egypt	23.23	-4.1%	-24.9%	9.85
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	23.23	23.23	0.0%	30.45	Housing & Development Bank	9.60	9.60	0.0%	33.63
Sidi Kerir Petrochemicals	22.16	22.16	0.0%	86.81	Taaleem Management Services	3.20	2.72	17.6%	1.66
Oriental Weavers	16.83	16.83	0.0%	23.30	Cleopatra Hospital Co.	4.50	3.81	18.1%	5.04
Orascom Construction	101.85	101.85	0.0%	5.48	Tenth Of Ramadan Pharma Ind. & Diagnostic	2.23	1.62	37.7%	9.85
Misr Fertilizers Production Co.	175.97	175.97	0.0%	16.21	T M G Holding	9.39	6.50	44.5%	17.69

## India\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	1922.00	3.7%	-50.2%	11778.104	Axis Bank	860.00	-2.4%	-7.9%	19804.93
Adani Ports And Sez.	681.00	3.2%	-16.8%	4164.40	Titan Company	2637.00	-1.0%	1.5%	4141.68
Nestle India Limited	21750.00	2.9%	10.9%	3587.91	ONGC	158.70	-0.8%	8.1%	2001.79
Wipro	384.70	2.8%	-2.0%	5331.98	Jsw Steel	726.60	-0.8%	-5.4%	1156.79
Britannia Inds.	4533.50	2.7%	5.2%	2176.34	Cipla	908.95	-0.6%	-15.5%	2450.69
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Larsen & Toubro	2360.00	2369.00	-0.4%	6769.45	Infosys	1252.95	1185.30	5.7%	12669.70
Nestle India Limited	21750.00	21849.60	-0.5%	3587.91	Cipla	908.95	852.00	6.7%	2450.69
ITC	426.20	428.25	-0.5%	5358.65	Tech Mahindra	1022.20	943.70	8.3%	5213.05
Dr Reddys Lab	4910.00	4940.00	-0.6%	1213.26	Wipro	384.70	352.00	9.3%	5331.98
Hdfc Bank	1687.15	1720.00	-1.9%	23428.87	Tata Consultancy Svs.	3215.00	2926.10	9.9%	9418.69

\*Market closed on 1/5

## Kenya\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
British American Tobacco Kenya Ltd	470.00	2.2%	2.2%	2.30	Bamburi Cement Ltd	24.05	-14.1%	-23.7%	2.48
Kenya Reinsurance Corp Ltd	1.89	1.1%	3.3%	0.05	WPP Scangroup	2.73	-8.7%	-9.3%	0.13
Absa Bank Kenya	12.15	0.8%	-1.2%	19.37	KCB Group	32.85	-3.7%	-13.8%	8.68
The Coop Bank of Kenya Ltd	13.30	0.8%	8.1%	2.34	NCBA Group	39.50	-3.4%	0.4%	7.66
Standard Chartered Bank Kenya Ltd	149.00	0.7%	4.4%	0.06	Nation Media Group	15.55	-2.8%	-2.5%	0.04
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)
Stanbic Holdings	116.00	116.75	-0.6%	0.89	Bamburi Cement Ltd	24.05	24.05	0.0%	2.48
NCBA Group	39.50	40.90	-3.4%	7.66	Nairobi Securities Exchange	6.00	5.96	0.7%	0.12
The Coop Bank of Kenya Ltd	13.30	14.00	-5.0%	2.34	Safaricom	16.50	16.35	0.9%	171.74
Absa Bank Kenya	12.15	12.95	-6.2%	19.37	WPP Scangroup	2.73	2.70	1.1%	0.13
Diamond Trust Bank Limited	54.75	60.00	-8.8%	0.21	Total Kenya Ltd	19.75	18.25	8.2%	0.08

\*Market closed on 1/5

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Agricultural Marketing Co.	41.25	6.5%	139.8%	180.56	United Cooperative Assurance Co.	8.60	-3.0%	19.4%	4.08
BinDawood Holding Co.	72.00	4.1%	48.8%	22.96	Al-Etihad Cooperative Insurance Co.	17.10	-3.0%	13.1%	3.49
Al Hassan Ghazi Ibrahim Shaker Co.	21.90	3.8%	14.5%	46.19	Naqi Water Co.	86.00	-2.8%	30.9%	70.24
Electrical Industries Co.	40.45	3.7%	72.1%	14.66	Al Gassim Investment Holding Co.	27.20	-2.7%	44.7%	53.06
Nayifat Finance Co.	20.30	3.6%	7.0%	63.83	Arabian Pipes Co.	52.30	-2.6%	30.8%	18.56
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	61.10	61.10	0.0%	64.60	Al Alamiya for Coop Insurance Co.	13.70	13.70	0.0%	1.00
Riyadh Cables Group Co.	52.80	52.80	0.0%	15.55	Alandalus Property Co.	18.12	14.40	0.0%	3.04
Nahdi Medical Co.	181.20	181.20	0.0%	30.28	Alkhabeer REIT Fund	6.80	6.80	0.0%	3.50
Scientific and Medical Equipment House Co.	71.10	71.10	0.0%	23.28	Allied Cooperative Insurance Group	13.00	13.00	0.0%	1.15
Elm Co.	436.20	436.20	0.0%	28.82	Dar Alarkan Real Estate Devlop Co.	16.00	6.68	0.0%	27.27

## South Africa\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum Holdings Ltd	17904.00	4.5%	-4.3%	31152.96	Glencore PLC	10759.00	-2.7%	-5.7%	47662.37
Impala Platinum Holdings Ltd	17774.00	2.7%	-16.6%	41235.68	British American Tobacco PLC	67083.00	-2.5%	-0.5%	55657.42
Old Mutual Ltd	1162.00	2.3%	11.1%	17244.08	Anheuser-Busch InBev	119411.00	-2.4%	16.6%	30168.00
Vodacom Group Ltd	12523.00	1.6%	2.1%	29679.51	AngloGold Ashanti Ltd	48941.00	-1.8%	48.7%	130672.47
Sibanye Stillwater Ltd	4037.00	1.4%	-9.7%	32901.55	Capitec Bank Holdings Ltd	159287.00	-1.7%	-14.3%	89267.62
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	40002.00	40002.00	0.0%	13946.30	Sasol Ltd	23717.00	22610.00	4.9%	34152.48
Bid Corp Ltd	41630.00	41630.00	0.0%	74101.40	Clicks Group Ltd	26734.00	25227.00	6.0%	26734.00
Anheuser-Busch InBev SA/NV	119411.00	122314.00	-2.4%	30168.00	Exxaro Resources Ltd	19182.00	17820.00	7.6%	16304.89
Bidvest Group Ltd	25055.00	27230.00	-8.0%	20472.94	Mr Price Group Ltd	15042.00	13450.00	11.8%	7720.37
NEPI Rockcastle NV	11054.00	11925.00	-7.3%	20118.28	Anglo American Platinum Ltd	108323.00	94530.00	14.6%	49119.06

\*Market closed on 1/5

## Vietnam\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vinhomes	49500.00	4.2%	3.1%	55.844,58	Techcombank	29500.00	-1.3%	14.1%	73.685,30
Tien Phong Commercial Joint Stock Bank	23800.00	3.3%	13.1%	189.935,60	Saigon Beer Alcohol Beverage Corp.	172000.00	-1.2%	3.1%	13.086,25
Vingroup JSC	52100.00	3.2%	-3.2%	115.225,25	Ho Chi Minh City Devp	18800.00	-1.1%	17.9%	22.224,29
Phat Dat Real Estate Development Corp	14150.00	2.9%	4.0%	240.646,46	Bank for Inv. and Devp	43500.00	-0.9%	12.7%	18.157,38
Vincom Retail	27700.00	2.6%	5.3%	77.829,18	Hoa Phat Group JSC	21650.00	-0.2%	20.3%	339.842,78
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	90500.00	96000.00	-5.7%	63.210,49	BaoViet Holdings	44900.00	44900.00	0.0%	12.048,20
Bank for Inv. and Devp	43500.00	49950.00	-12.9%	18.157,38	Vietnam Rubber Group JSC	15550.00	15550.00	0.0%	22.501,72
Saigon Beer Alcohol Beverage Corp.	172000.00	197900.00	-13.1%	13.086,25	Masan Group Corp	73100.00	73100.00	0.0%	44.580,89
Asia Commercial JS Bank	24200.00	29080.00	-16.8%	236.632,75	Mobile World Inv. Corp	39200.00	39200.00	0.0%	98.100,75
Vinamilk	70000.00	87004.15	-19.5%	78.108,40	No Va Land Invest	14300.00	14300.00	0.0%	281.039,20

\*Market closed on 1/5

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