

# Daily Market Report

17 May 2023

## JSE

JSE All-Share Index decreased by 0.37% and closed at 77,973.02 points on Tuesday, as the Mining and Consumer Discretionary sectors recorded losses.

## BRVM

BRVM composite Index increased by 0.20% and closed at 196.47 points on Tuesday, with Sitab Côte d'Ivoire and Oragroup Togo being the top gainers.

## NSE

NGX All-Share Index increased by 0.36% to close at 52,419.33 points on Tuesday, as the Insurance, Banking, and Consumer Goods sectors recorded gains.

## EGX

EGX 30 Index decreased by 0.59% and closed at 17,033.99 points on Tuesday, as the market lost LE 11 billion of market cap, amid foreign selling.

## ESG

Casablanca ESG 10 Index increased by 0.35% to close at 809.17 points on Tuesday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	0.37%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.20%
<b>NGX</b> Nigerian Stock Exchange	▲	0.36%
<b>EGX</b> Egyptian Stock Exchange	▼	0.59%
<b>ESG</b> Casablanca Stock Exchange	▲	0.35%

## African Markets

**Nigeria:** NGX 30 Index increased by 0.58% to close at 1,896.97 points on Tuesday. Nigerian Breweries and Guaranty were the top gainers.

**Egypt:** EGX 30 Index decreased by 0.59% and closed at 17,033.99 points on Tuesday, as the market lost LE 11 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index increased by 0.47% and closed at 1,474.49 points on Tuesday. Safaricom and Total Kenya Ltd were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.36% and closed at 72,652.63 points on Tuesday, as the Mining and Consumer Discretionary sectors recorded losses.

## Nigeria Key Indicators

	Current
Inflation	22.22%
Exchange Rate	₦ 461.07
<b>INTERBANK RATES</b>	
OPR	13.38 ▲
Overnight	14.13 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX Index inched up by 0.05% to close at 9,475.66 points on Tuesday, as gains in the Financials, Utilities and Materials sectors led shares higher. MSCI UAE increased by 0.44% to close at 384.175 points.

**Vietnam:** VN-30 Index decreased by 0.36% to close at 1,068.66 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam inched down by 0.09% to close at 633.68 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.22% to close at 11,206.02 points on Tuesday, as losses in the Energy, Banks, and Utilities sectors pushed shares lower. MSCI Saudi Arabia was down by 0.18% and closed at 1,504.59 points.

**India:** Nifty 50 Index declined by 0.61% to close at 18,286.50 points on Tuesday, as losses in the Bank, IT, and Metal pushed shares lower. MSCI India decreased by 0.39% to close at 2,032.33 points.

## News

### Nigeria:

Lagos targets N3b IGR from agric  
Airtel Africa's profit dips in Q1  
NCX, firm partner on non-oil earnings

### Kenya:

Safaricom buys M-Pesa cash firm from Vodafone  
StanChart gets nod to sell assets in loan default  
State ends bailouts for KQ to pave way for restructuring

### Abu Dhabi:

AD Ports Group revenue up 73% at Dh1.82b in Q1 2023  
UAE Central Bank imposes sanctions on 8 banks  
Mensha Ventures, partners sign green energy deals in Abu Dhabi

### Saudi Arabia:

Saudi Arabia's NDMC raises \$6bn from sale of Islamic bonds  
Saudi holdings of US Treasuries rise by \$4.5bn in March  
Public Investment Fund ratifies Saudi-Bahraini Investment Co. for \$5bn

### Egypt:

Egypt, Indonesia ink deal to boost bilateral trade  
Egypt's imports of durable consumer goods decline by \$441.7M  
NI Capital is preparing to sell stakes in 2 state-owned companies

### South Africa:

Sarb plans new forecasts after May interest-rate meeting  
SA's unemployment rate rises to 32.9% in Q1  
SA credit rating outlook dims

### India:

Airtel profit in Q4 rises 49% to Rs3,000 crore  
Infosys wins \$1.5 billion deal from BP  
Bank of Baroda Q4 profit jumps over 2-fold to Rs 4,775cr

### Vietnam:

PM approves National Power Development Plan VIII  
G-bond value raised in April exceeds 34.8 trillion VND  
Vinacomin, Japanese firm sign coal mining training deal

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,475.66	0.05%	-1.7%	-3.2%	-7.2%	AED/USD	3.67	0.0%	0.0%
Egypt	17,033.99	-0.6%	-1.4%	-3.6%	16.7%	EGP/USD	30.90	0.0%	25.1%
India	18,286.50	-0.6%	-0.2%	1.2%	1.0%	INR/USD	82.28	0.0%	-0.6%
Kenya	1,474.49	0.5%	0.2%	-6.6%	-12.0%	KES/USD	137.10	0.0%	11.0%
Nigeria	1,896.97	0.6%	0.8%	0.3%	3.0%	NGN/USD	460.57	-0.3%	2.8%
Saudi Arabia	11,206.02	-0.2%	-1.6%	-0.9%	6.9%	SAR/USD	3.75	0.0%	-0.2%
South Africa	72,652.63	-0.4%	-0.4%	0.1%	8.5%	ZAR/USD	19.09	0.4%	12.1%
Vietnam	1,068.66	-0.4%	0.4%	1.6%	6.3%	VND/USD	23,452.50	0.0%	-0.8%

## MSCI Emerging Markets

MSCI Frontier	479.62	0.4%	0.3%	-0.9%	1.5%	Brent Crude (\$)	74.91	-0.4%	-12.8%
MSCI Frontier 100	1,093.27	0.2%	0.0%	-1.6%	0.2%	Gold (\$)	1,993.00	-1.5%	9.1%
MSCI Emerging	979.24	0.2%	0.6%	-1.8%	2.4%	Copper (\$)	8,121.50	-1.8%	-3.0%
MSCI World (USD)	2,802.39	-0.6%	-0.2%	-1.2%	7.7%	Coffee (\$)	178.10	2.7%	14.0%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	35.30	10.0%	-13.9%	140.31	Wema	4.15	-1.2%	6.4%	5.96
Transnational Corporation	3.06	7.7%	170.8%	261.68	Fidelity	5.65	-0.9%	29.9%	17.80
Axamansard	2.66	6.4%	33.0%	79.66	Presco	147.00	-0.5%	6.9%	169.00
P Z Cussons	13.05	4.4%	15.0%	6.74	Flour Mills	31.05	-0.2%	9.3%	61.06
Guaranty	25.10	4.1%	9.1%	723.97					
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	4.11	4.11	0.0%	9.04	Cap	19.05	15.25	24.9%	16.12
Wema	4.15	4.15	0.0%	5.96	Unilever	13.15	10.50	25.2%	15.39
Transnational Corporation	3.06	3.06	0.0%	261.68	Custodian	6.00	4.55	31.9%	2.67
Total	217.50	217.50	0.0%	24.35	Nestle	1043.80	764.90	36.5%	29.52
Seplat Petroleum	1175.00	1175.00	0.0%	7.22	Guaranty	25.10	18.00	39.4%	723.97

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
FOODCO NATIONAL FOODSTUFF	1.96	12.6%	-22.2%	0.01	RAK Co. for White Cement & Const Materials	1.10	-6.0%	-38.5%	0.00
Al Dar Properties	5.23	3.4%	18.1%	17.01	Bayanat AI	3.94	-5.7%	-19.6%	9.40
Fertiglobe	3.26	2.2%	-22.9%	30.01	National Corp for Tourism & Hotels	3.40	-5.6%	13.3%	1.60
Abu Dhabi Commercial Bank	8.23	2.1%	-8.6%	13.37	Methaq Takaful Insurance Compnay	0.67	-4.5%	4.7%	0.07
National Marine Dredging Co.	19.36	1.9%	-20.9%	15.23	Alpha Dhabi Holding	19.20	-4.0%	-29.1%	69.13
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	ANAN INVESTMENT HOLDING	4.07	0.00	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.00	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Invest Bank	0.45	0.00	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
United Fidelity Insurance Company	1.60	1.60	0.0%	0.00	Sharjah Insurance Co.	1.50	1.50	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£)
Ibsinsa Pharma	2.13	10.9%	-1.4%	93.69	Oriental Weavers	15.52	-4.8%	49.2%	50.69
Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.35	2.2%	-20.9%	16.45	Misr Fertilizers Production Company	167.14	-4.5%	17.4%	32.67
ELSWEDY ELECTRIC	17.58	1.0%	46.5%	62.75	Heliopolis Housing	8.84	-3.9%	11.1%	40.00
Egyptian Financial Group-Hermes Holding Company	18.94	0.7%	5.9%	236.08	GB AUTO	5.56	-2.8%	3.7%	67.39
Fawry For Banking Technology And Electronic Payment	5.59	0.5%	6.7%	85.27	Alexandria Mineral Oils Company	8.70	-2.6%	-18.4%	21.11
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	22.68	22.68	0.0%	48.35	Cleopatra Hospital Co.	4.65	3.81	22.0%	16.41
Sidi Kerir Petrochemicals	22.09	22.09	0.0%	45.69	T M G Holding	8.90	6.50	36.9%	10.95
Oriental Weavers	15.52	15.52	0.0%	50.69	Taaleem Management Services	3.80	2.72	39.7%	2.62
Orascom Construction	99.30	99.30	0.0%	3.23	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.35	1.62	45.1%	16.45
Misr Fertilizers Production Company	167.14	167.14	0.0%	32.67	E-finance For Digital and Financial Investments	17.06	11.25	51.6%	3.32

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	363.00	1.7%	9.8%	1369.493	Kotak Mahindra Bank	1940.00	-1.7%	6.2%	8955.16
Coal India	241.00	1.4%	7.1%	1442.93	Tata Motors	522.20	-1.6%	34.6%	8749.42
ONGC	167.60	1.2%	14.2%	2056.65	Mahindra & Mahindra	1265.00	-1.6%	1.3%	1998.72
Bajaj Finance	6778.00	1.0%	3.1%	8601.25	Apollo Hospitals Enterprise Ltd	4555.70	-1.5%	1.7%	1427.15
NTPC	177.50	0.9%	6.6%	1393.55	Bharti Airtel	785.60	-1.4%	-2.5%	3841.16
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Titan Company	2788.40	2802.10	-0.5%	1532.43	Infosys	1263.15	1185.30	6.6%	6642.20
ONGC	167.60	169.00	-0.8%	2056.65	Cipla	920.00	852.00	8.0%	2758.53
Icici Bank	944.30	958.20	-1.5%	18606.18	Wipro	387.00	352.00	9.9%	786.30
Bajaj Auto	4536.00	4628.85	-2.0%	1468.71	UPL	674.00	607.50	10.9%	1257.25
Britannia Inds.	4596.00	4700.00	-2.2%	1220.20	Tata Consultancy Svs.	3255.95	2926.10	11.3%	3221.87

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom	14.30	10.0%	-40.8%	17.44	Diamond Trust Bank Limited	45.55	-8.6%	-8.9%	0.05
Total Kenya Ltd	21.85	8.4%	-8.4%	0.45	Nation Media Group	16.05	-1.8%	0.6%	0.02
KCB Group	31.20	7.6%	-18.1%	1.40	Nairobi Securities Exchange	6.00	-1.6%	-11.5%	0.05
NCBA Group	31.40	2.3%	-20.2%	9.85	Equity Group Holdings	39.90	-1.5%	-10.3%	67.45
East African Breweries Limited	145.00	2.1%	-13.4%	21.82	British American Tobacco Kenya Ltd	455.00	-1.1%	-1.1%	4.28
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	111.25	117.75	-5.5%	3.67	Centum Investment Company	8.06	8.00	0.8%	0.06
The Cooperative Bank of Kenya Ltd	12.30	14.00	-12.1%	15.89	Nairobi Securities Exchange	6.00	5.94	1.0%	0.05
British American Tobacco Kenya Ltd	455.00	530.00	-14.2%	4.28	Bamburi Cement Limited	24.00	23.35	2.8%	0.73
Total Kenya Ltd	21.85	26.40	-17.2%	0.45	Diamond Trust Bank Limited	45.55	44.00	3.5%	0.05
Standard Chartered Bank Kenya Ltd	141.00	171.00	-17.5%	5.44	WPP Scangroup	2.81	2.70	4.1%	0.07

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Middle East Healthcare Co.	50.50	9.9%	98.4%	119.36	National Medical Care Co.	99.80	-3.1%	35.0%	36.92
Astra Industrial Group	74.40	9.9%	43.9%	93.20	Anaam International Holding Group	26.95	-3.1%	30.2%	66.11
Saudi Pharmaceutical Industries and Medical Appliances Corp.	29.00	9.9%	33.1%	75.49	Riyadh Cables Group Co.	57.10	-2.7%	53.7%	12.74
Malath Cooperative Insurance Co.	16.88	7.5%	52.9%	51.71	Saudi Printing and Packaging Co.	17.64	-2.2%	0.8%	8.69
Middle East Specialized Cables Co.	15.48	5.6%	56.4%	74.84	SEDCO Capital REIT Fund	9.35	-2.2%	-9.4%	3.22
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	60.90	60.90	0.0%	92.95	Al Kathiri Holding Co.	3.40	3.40	0.0%	11.73
Riyadh Cables Group Co.	57.10	57.10	0.0%	12.74	Alandalus Property Co.	18.20	14.40	0.0%	3.11
Nahdi Medical Co.	177.00	177.00	0.0%	11.26	Alkhabeer REIT Fund	6.93	6.93	0.0%	0.95
Scientific and Medical Equipment House Co.	73.10	73.10	0.0%	36.25	Allied Cooperative Insurance Group	14.12	14.12	0.0%	3.39
Elm Co.	469.80	469.80	0.0%	41.80	Arabian Centres Co.	20.98	18.70	0.0%	17.22

## 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	16975.00	2.4%	-9.3%	36326.50	AngloGold Ashanti Ltd	47755.00	-2.5%	45.1%	80705.95
MultiChoice Group	10717.00	1.6%	-8.6%	12003.04	Sasol Ltd	22991.00	-1.9%	-14.7%	18427.98
Naspers Ltd	331082.00	1.3%	17.2%	178095.63	Glencore	10245.00	-1.7%	-10.2%	24588.00
Prosus NV	140831.00	1.0%	6.7%	62544.46	Mr Price Group Ltd	13696.00	-1.5%	-13.8%	13422.08
Investec PLC	10570.00	0.8%	42.4%	10041.50	Woolworths Holdings Ltd	6116.00	-1.4%	-2.8%	26788.08
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	41900.00	42023.00	-0.3%	12820.56	Capitec Bank Holdings Ltd	147879.00	147879.00	0.0%	46389.64
Cie Financiere Richemont SA	327761.00	332300.00	-1.4%	104955.63	Vodacom Group Ltd	11122.00	11122.00	0.0%	29250.86
Bid Corp Ltd	40902.00	42000.00	-2.6%	30507.98	Exxaro Resources Ltd	17192.00	17162.00	0.2%	9057.09
Gold Fields Ltd	29999.00	31225.00	-3.9%	60897.97	MultiChoice Group	10717.00	10579.00	1.3%	12003.04
AngloGold Ashanti Ltd	47755.00	55688.00	-14.2%	80705.95	Sasol Ltd	22991.00	22136.00	3.9%	18427.98

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Petro Vietnam Power Corp	13500.00	1.5%	26.8%	150.610,78	Vingroup	52900.00	-2.8%	-1.7%	140.199,24
Sai Gon Thuong Tin Commercial	27400.00	1.5%	21.8%	359.163,86	Phat Dat Real Estate Development Corp	13600.00	-1.5%	0.0%	57.866,89
No Va Land Invest	13650.00	1.1%	-2.5%	147.606,20	Mobile World Inv. Corp	38450.00	-1.2%	-10.4%	82.218,33
Vinamilk	69700.00	1.0%	-8.4%	95.399,20	Masan Group Corp	73300.00	-1.1%	-21.2%	28.281,99
Vietcombank	92600.00	1.0%	15.8%	61.716,10	Vietnam Prosperity	19600.00	-1.0%	9.5%	147.819,29
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)
Vietcom bank	92600.00	96000.00	-3.5%	61.716,10	BaoViet Holdings	45300.00	45300.00	0.0%	12.600,00
Bank for Inv. and Devp	45000.00	49950.00	-9.9%	19.298,31	Vietnam Rubber Group JSC	16000.00	16000.00	0.0%	66.953,32
Asia Commercial JS Bank	25000.00	29080.00	-14.0%	36.504,94	Masan Group Corp	73300.00	73300.00	0.0%	28.281,99
FPT Corp	81500.00	97944.43	-16.8%	62.203,64	Mobile World Inv. Corp	38450.00	38450.00	0.0%	82.218,33
Saigon Beer Alcohol Beverage Corp.	163000.00	197900.00	-17.6%	11.994,48	No Va Land Invest	13650.00	13650.00	0.0%	147.606,20

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