

Daily Market Report

18 May 2023

JSE

JSE All-Share Index increased by 0.54% and closed at 78,390.74 points on Wednesday, as the Technology and Industrials sectors recorded gains.

BRVM

BRVM composite Index decreased by 0.25% and closed at 195.98 points on Wednesday, with Air Liquide Côte d'Ivoire and Sode Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.31% to close at 52,580.86 points on Wednesday, as the Insurance, Banking, and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index declined by 1.12% and closed at 16,844.01 points on Wednesday, as the market lost LE 14 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index declined by 0.61% to close at 804.23 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.54%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.25%
NGX Nigerian Stock Exchange	▲	0.31%
EGX Egyptian Stock Exchange	▼	1.12%
ESG Casablanca Stock Exchange	▼	0.61%

African Markets

Nigeria: NGX 30 Index was up by 0.17% to close at 1,900.23 points on Wednesday. Nigerian Breweries and Guaranty were the top gainers.

Egypt: EGX 30 Index declined by 1.12% and closed at 16,844.01 points on Wednesday, as the market lost LE 14 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index increased by 0.58% and closed at 1,483.01 points on Wednesday. Safaricom and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index increased by 0.74% and closed at 73,189.19 points on Wednesday, as the Technology and Industrials sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	22.22%
Exchange Rate	₦ 461.20
INTERBANK RATES	
OPR	17.88 ▲
Overnight	18.25 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.53% to close at 9,525.97 points on Wednesday, as gains in the Health Care, Real Estate and Industrials sectors led shares higher. MSCI UAE increased by 0.79% to close at 387.22 points.

Vietnam: VN-30 Index decreased by 0.38% to close at 1,064.55 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.26% to close at 632.06 points.

Saudi Arabia: Tadawul All Share Index increased by 0.64% to close at 11,277.60 points on Wednesday, as gains in the Health Care Equipment & Svc, Banks, and Retailing sectors led shares higher. MSCI Saudi Arabia increased by 0.84% and closed at 1,517.45 points.

India: Nifty 50 Index declined by 0.57% to close at 18,181.75 points on Wednesday, as losses in the Bank, IT, and Metal pushed shares lower. MSCI India declined by 0.62% to close at 2,019.77 points.

News

Nigeria:

Banks' assets grows to N78tn, says CBN
Non-Interest Fund records N38.41b in assets
FG eyes 1600MW with new power stations, transformers

Kenya:

Bank accounts with over Sh100,000 hit 1.9 million
StanChart first-quarter profit rises 46pc to Sh4 billion
Four counties hold 55pc of all bank branches in Kenya

Abu Dhabi:

UAE's Aldar launches 10-year \$500 million green sukuk
UAE gross banks' assets rise by 2.2% to \$1.02tn in February
World Bank expects UAE's non-oil economy to grow by 4.8% in 2023

Saudi Arabia:

Saudi to attract huge investments as NCP inks deal with top Chinese bank
Saudi non-oil sector to grow 4.7% despite regional slowdown: WB
Container volumes surge 13.34% at Saudi ports: Mawani

Egypt:

Egypt's exports record a jump in 2022: Trade Ministry
Egypt, MIZUHA sign deal to manufacture atmospheric water generators
HC expects CBE to raise policy rates by 100 bps

South Africa:

Santam reports sound results despite adverse claims experience
Transnet to restore full coal line service after derailment
Ninety One sees outflows of R237bn as clients ditch risky assets

India:

India launches \$2 billion drive to woo laptop makers like Apple
India's Russian oil buying hits record high, slashes Mideast, Africa share
RBI clears SBI Funds to buy up to 9.99% stake in HDFC Bank

Vietnam:

Vingroup sets record revenue this year
Bac Ninh promises favourable conditions for Korean investors
Đà Nẵng calls for investment in 10 logistics centre projects

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,525.97	0.5%	-1.1%	-2.7%	-6.7%	AED/USD	3.67	0.0%	0.0%
Egypt	16,844.01	-1.1%	-2.5%	-4.7%	15.4%	EGP/USD	30.90	0.0%	25.1%
India	18,181.75	-0.6%	-0.7%	0.6%	0.4%	INR/USD	82.39	0.1%	-0.4%
Kenya	1,483.01	0.6%	0.7%	-6.1%	-11.5%	KES/USD	137.40	0.2%	11.3%
Nigeria	1,900.23	0.2%	0.9%	0.5%	3.1%	NGN/USD	460.70	0.0%	2.8%
Saudi Arabia	11,277.60	0.6%	-1.0%	-0.3%	7.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,189.19	0.7%	0.3%	0.8%	9.3%	ZAR/USD	19.28	1.0%	13.2%
Vietnam	1,064.55	-0.4%	0.02%	1.2%	5.9%	VND/USD	23,430.00	-0.1%	-0.9%

MSCI Emerging Markets

MSCI Frontier	478.68	-0.2%	0.1%	-1.1%	1.3%	Brent Crude (\$)	76.96	2.7%	-10.4%
MSCI Frontier 100	1,095.28	0.2%	0.2%	-1.4%	0.4%	Gold (\$)	1,984.90	-0.4%	8.7%
MSCI Emerging	975.83	-0.3%	0.3%	-2.1%	2.0%	Copper (\$)	8,302.00	2.2%	-0.8%
MSCI World (USD)	2,820.92	0.7%	0.4%	-0.5%	8.4%	Coffee (\$)	176.87	-0.7%	13.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	38.70	9.6%	-5.6%	217.35	Transnational Corporation	2.90	-5.2%	156.6%	185.59
Cadbury	15.10	8.2%	26.9%	9.84	UACN	8.40	-2.3%	-18.0%	6.17
P Z Cussons	14.00	7.3%	23.3%	17.14	Fidelity	5.53	-2.1%	27.1%	1418.15
Guaranty	26.15	4.2%	13.7%	1568.31	Lafarge Africa	24.50	-2.0%	2.1%	66.12
International Breweries	4.65	3.3%	-1.1%	2.04	Access	10.10	-0.5%	18.8%	1131.42
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	4.13	4.13	0.0%	2.98	Unilever	13.15	10.50	25.2%	20.42
Wema	4.15	4.15	0.0%	0.52	Cap	19.30	15.25	26.6%	7.27
Transnational Corporation	2.90	2.90	0.0%	185.59	Custodian	6.00	4.55	31.9%	2.14
Total	217.50	217.50	0.0%	11.03	Nestle	1043.80	764.90	36.5%	4.76
Seplat Petroleum	1175.00	1175.00	0.0%	46.28	Guaranty	26.15	18.00	45.3%	1568.31

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Bayanat Al	4.19	6.4%	-14.5%	13.32	Fujairah Cement Industries	0.37	-9.8%	-23.4%	0.00
Multiply Group	3.06	4.8%	-34.1%	63.88	Ras Al Khaimah Poultry & Feeding Co.	2.00	-6.5%	24.2%	0.01
Invictus Investment Company	2.99	4.2%	-21.7%	9.89	Abu Dhabi National Hotels Co.	5.45	-2.7%	42.3%	48.38
Methaq Takaful Insurance Compnay	0.69	4.1%	9.0%	0.10	Hayah Insurance Co.	0.87	-1.9%	-10.6%	0.01
Alpha Dhabi Holding PJSC	19.96	4.0%	-26.3%	77.40	Fertiglobe plc	3.20	-1.8%	-24.3%	21.05
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	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.34	0.0%	0.00	Union Insurance Co.	0.50	0.50	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Sharjah Insurance Company	1.50	1.50	0.0%	0.00	Sharjah Insurance Co.	1.50	1.50	0.0%	0.00
United Fidelity Insurance Company	1.60	1.60	0.0%	0.00	Invest Bank	0.45	0.45	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	3.88	2.1%	-3.0%	8.08	Oriental Weavers	14.47	-6.8%	39.1%	49.88
Orascom Construction	100.58	1.3%	4.8%	5.67	Sidi Kerir Petrochemicals	20.60	-6.8%	57.0%	69.60
Telecom Egypt	22.94	1.2%	-8.6%	49.39	Ezz Steel	40.70	-5.2%	75.1%	60.96
Commercial International Bank	52.50	1.0%	26.6%	301.73	GB AUTO	5.32	-4.3%	-0.7%	54.71
Cairo For Investment And Real Estate Development	10.68	0.7%	-17.8%	19.19	Alexandria Mineral Oils Company	8.34	-4.1%	-17.8%	19.19
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	22.94	22.94	0.0%	49.39	Cleopatra Hospital Co.	4.58	3.81	20.2%	4.22
Sidi Kerir Petrochemicals	20.60	20.60	0.0%	69.60	T M G Holding	8.57	6.50	31.8%	10.48
Oriental Weavers	14.47	14.47	0.0%	49.88	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.30	1.62	42.0%	16.07
Orascom Construction	100.58	100.58	0.0%	5.67	Taaleem Management Services	3.88	2.72	42.6%	8.08
Misir Fertilizers Production Company	166.61	166.61	0.0%	5.67	E-finance For Digital and Financial Investments	17.14	11.25	52.4%	4.78

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	2722.00	1.3%	-0.6%	3189.436	Kotak Mahindra Bank	1909.00	-2.0%	4.5%	10490.11
ITC	428.05	1.0%	29.1%	4034.18	Apollo Hospitals Enterprise Ltd	4476.00	-1.7%	0.0%	1200.53
Indusind Bank	1232.00	1.0%	1.0%	5748.62	SBI Life Insurance	1161.25	-1.7%	-5.7%	803.69
UPL	679.00	0.9%	-5.2%	1711.20	Hcl Technologies	1075.95	-1.4%	3.5%	3865.64
Bharti Airtel	793.25	0.8%	-1.6%	5165.02	Asian Paints	3096.00	-1.3%	0.3%	2589.66
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ONGC	167.20	169.00	-1.1%	1228.28	Infosys	1248.40	1185.30	5.3%	13068.27
ITC	428.05	433.45	-1.2%	4034.18	Cipla	922.15	852.00	8.2%	1724.79
Titan Company	2765.00	2802.10	-1.3%	1491.77	Wipro	382.80	352.00	8.8%	1029.34
Britannia Inds.	4627.00	4700.00	-1.6%	1239.94	Tata Consultancy Svs.	3209.00	2926.10	9.7%	5110.87
Bajaj Auto	4528.05	4628.85	-2.2%	1575.41	Tech Mahindra	1054.00	943.70	11.7%	2943.38

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom	15.50	8.4%	-35.8%	281.66	Equity Group Holdings Plc	39.45	-1.1%	-11.3%	22.77
NCBA Group	32.25	2.7%	-18.0%	0.39	Centum Investment Company	8.00	-0.7%	-4.3%	0.11
Diamond Trust Bank Limited	46.30	1.6%	-7.4%	0.23	Kenya Power & Lighting Limited	1.40	-0.7%	-10.3%	0.83
East African Breweries Limited	147.00	1.4%	-12.2%	10.73	Nairobi Securities Exchange	5.96	-0.7%	-12.1%	0.06
KCB Group Plc	31.55	1.1%	-17.2%	70.89	Kenya Reinsurance Corporation Ltd	1.81	-0.5%	-1.1%	0.35
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	111.00	117.75	-5.7%	4.38	Centum Investment Company	8.00	8.00	0.0%	0.11
The Cooperative Bank of Kenya Ltd	12.30	14.00	-12.1%	17.05	Nairobi Securities Exchange	5.96	5.94	0.3%	0.06
British American Tobacco Kenya Ltd	455.00	530.00	-14.2%	39.86	Bamburi Cement Ltd	24.00	23.35	2.8%	0.86
Total Kenya Ltd	21.85	26.40	-17.2%	0.45	WPP Scangroup	2.81	2.70	4.1%	0.05
Standard Chartered Bank Kenya Ltd	140.25	171.00	-18.0%	37.01	Equity Group Holdings	39.45	37.90	4.1%	22.77

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Hassan Ghazi Ibrahim Shaker Co.	26.25	9.8%	37.3%	32.72	Saudi Airlines Catering Co.	88.00	-7.4%	17.3%	116.76
Allied Cooperative Insurance Group	14.94	5.8%	38.3%	26.05	Thob Al Aseel Co.	46.70	-2.7%	23.5%	11.65
The Company for Cooperative Insurance	117.40	5.2%	45.8%	75.66	Middle East Specialized Cables Co.	15.08	-2.6%	52.3%	21.35
Malath Cooperative Insurance Co.	17.72	5.0%	60.5%	46.38	Saudi Company for Hardware	33.60	-2.5%	23.5%	12.75
Savola Group	35.65	4.6%	29.9%	96.50	Electrical Industries Co.	41.60	-2.5%	77.0%	6.72
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	60.20	60.20	0.0%	75.11	Al Kathiri Holding Co.	3.36	3.36	0.0%	15.81
Riyadh Cables Group Co.	57.60	57.60	0.0%	15.40	Alandalus Property Co.	18.34	14.40	0.0%	1.25
Nahdi Medical Co.	178.00	178.00	0.0%	12.91	Alkhabeer REIT Fund	6.90	6.90	0.0%	0.82
Scientific and Medical Equipment House Co.	73.40	73.40	0.0%	16.59	Allied Cooperative Insurance Group	14.94	14.94	0.0%	26.05
Elm Co.	473.60	473.60	0.0%	24.41	Arabian Centres Co.	20.78	18.70	0.0%	7.35

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	341482.00	4.4%	20.9%	348311.64	Capitec Bank Holdings Ltd	142287.00	-3.8%	-23.4%	96167.51
Prosus NV	145480.00	3.4%	23.5%	135795.40	MultiChoice Group	10504.00	-2.6%	-10.4%	9801.07
BHP Group Ltd	56786.00	2.0%	7.8%	25941.55	Aspen Pharmacare Holdings Ltd	17035.00	-2.4%	25.0%	13824.07
Glencore PLC	10426.00	1.8%	6.7%	52130.00	Mondi PLC	30447.00	-2.1%	4.6%	20506.66
Anglo American PLC	56726.00	1.4%	42.4%	47785.98	Growthpoint Properties Ltd	1168.00	-2.0%	-2.8%	10617.12
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)
Cie Financiere Richemont SA	332677.00	332677.00	0.0%	109969.71	Capitec Bank Holdings Ltd	142287.00	142287.00	0.0%	96167.51
Reinet Investments SCA	41450.00	42023.00	-1.4%	12432.51	Vodacom Group Ltd	10974.00	10974.00	0.0%	19753.20
Bid Corp Ltd	40310.00	42000.00	-4.0%	22903.34	MultiChoice Group	10504.00	10504.00	0.0%	9801.07
Gold Fields Ltd	30055.00	31225.00	-3.7%	54099.00	Exxaro Resources Ltd	17308.00	17162.00	0.9%	6981.53
AngloGold Ashanti Ltd	48135.00	55688.00	-13.6%	51504.45	Sasol Ltd	23127.00	22136.00	4.5%	21683.64

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vinhomes	53400.00	2.3%	11.3%	166.035,69	No Va Land Invest	13300.00	-2.6%	-5.0%	175.492,26
Vietjet Aviation	98300.00	0.8%	-10.2%	97.068,35	Tien Phong Commercial Joint Stock Bank	23250.00	-2.5%	10.5%	46.449,20
Vingroup J	53200.00	0.6%	-1.1%	115.514,59	Vietnam Prosperity	19200.00	-2.0%	7.3%	245.891,56
Ho Chi Minh City Devp	19600.00	0.5%	22.9%	36.542,92	Saigon Securities Inc	22450.00	-2.0%	26.8%	513.100,22
Vietcombank	92800.00	0.2%	16.0%	53.125,04	Military Commercial Bank	18450.00	-1.9%	7.9%	169.297,41
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	92800.00	96000.00	-3.3%	53.125,04	BaoViet Holdings	45050.00	45050.00	0.0%	15.019,11
Bank for Inv. and Devp	44800.00	49950.00	-10.3%	38.966,42	Vietnam Rubber Group	15850.00	15850.00	0.0%	40.305,51
Asia Commercial JS Bank	24900.00	29080.00	-14.4%	86.159,01	Masan Group Corp	73100.00	73100.00	0.0%	47.514,45
FPT Corp	81500.00	97944.43	-16.8%	79.883,96	Mobile World Inv. Corp	38150.00	38150.00	0.0%	50.853,64
Saigon Beer Alcohol Beverage Corp.	162500.00	197900.00	-17.9%	16.741,83	No Va Land Invest	13300.00	13300.00	0.0%	175.492,26

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