

Daily Market Report

26 May 2023

JSE

JSE All-Share Index increased by 0.73% and closed at 76,174.61 points on Thursday, as the Consumer Goods and Industrials sectors recorded gains.

BRVM

BRVM composite Index inched up by 0.08% and closed at 196.42 points on Thursday, with Total Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index decreased by 0.20% to close at 52,821.60 points on Thursday, as the Banking, Consumer Goods and insurance sectors recorded losses.

EGX

EGX 30 Index decreased by 0.27% and closed at 17,043.62 points on Thursday, as the market lost LE 1.105 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index dropped by 1.27% to close at 806.46 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.73%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.08%
NGX Nigerian Stock Exchange	▼	0.20%
EGX Egyptian Stock Exchange	▼	0.27%
ESG Casablanca Stock Exchange	▼	1.27%

African Markets

Nigeria: NGX 30 Index decreased marginally by 0.09% to close at 1,909.72 points on Thursday. Unilever and Sterling were the top losers.

Egypt: EGX 30 Index decreased by 0.27% and closed at 17,043.62 points on Thursday, as the market lost LE 1.105 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.32% and closed at 1,480.87 points on Thursday. Bamburi Cement Limited and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index increased by 0.91% and closed at 70,971.25 points on Thursday, as the Consumer Goods and Industrials sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	22.22%
Exchange Rate	₦ 461.31
INTERBANK RATES	
OPR	11.25 ▲
Overnight	11.50 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.67% to close at 9,400.52 points on Thursday, as losses in the Financials, Real Estate and Industrials sectors pushed shares lower. MSCI UAE declined by 1.10% to close at 378.58 points.

Vietnam: VN-30 Index inched up by 0.06% to close at 1,062.15 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam was up by 0.17% to close at 628.32 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.46% to close at 11,184.57 points on Thursday, as losses in the Commercial & Professional Svc, Insurance, and Telecommunication Services sectors pushed shares lower. MSCI Saudi Arabia declined by 0.86% and closed at 1,492.17 points.

India: Nifty 50 Index increased by 0.20% to close at 18,321.15 points on Thursday, as gains in the IT, FMCG, and Media led shares higher. MSCI India increased by 0.28% to close at 2,042.71 points.

News

Nigeria:

FGN savings bond hits N5bn in five months – NGX
OML 130: NNPC, CNOOC, SAPETRO renew oil production contracts
CBN disburses N173bn under 100-for-100 policy

Kenya:

Indian oil firms confirm talks to buy Kenya Tullow Oil stake
KCB Group injects extra Sh1.2bn in Ugandan unit
Biden pushes Ruto to open doors for US professionals

Abu Dhabi:

UAE Islamic banks' assets rise to AED631 bn by end Feb 2023
UAE: Adnoc to list logistics unit at Dh2.01 per share
ENGIE seeks further UAE expansion after \$11.9bn investments

Saudi Arabia:

Saudi Arabia's PIF announces \$3bn investment unit for Iraq
Riyadh municipality launches 40 investment initiatives
Saudi Arabia's merchandise exports rise 4.4% to \$28bn

Egypt:

AfDB expects Egypt's GDP growth at 4.8 percent for FY 2023/24
Two Chinese cos offer to build \$300 mln iron complex in SCZone
Qatar committed to investing \$5 bln in Egypt: Finance minister

South Africa:

Sarb hikes repo rate by 50bps
SA producer inflation surprises as rate drops below 9%
Citigroup teams up with SA to fund new Mega River City and airport

India:

No angel tax on funding from 21 nations
Indian oil companies await \$300 mn dividend for business in Russia
Voda Idea Q4 loss narrows to ₹6,419 crore

Vietnam:

HCM City, British Columbia eye stronger trade and investment ties
Vietnam, Israel cooperate to early enforce trade deal
Pfizer Vietnam, VNVC sign MoU to protect public health

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,400.52	-0.7%	-0.8%	-4.0%	-7.9%	AED/USD	3.67	0.0%	0.0%
Egypt	17,043.62	-0.3%	1.8%	-3.5%	16.7%	EGP/USD	30.89	0.0%	25.1%
India	18,321.15	0.2%	0.6%	1.4%	1.2%	INR/USD	82.68	0.0%	-0.1%
Kenya	1,480.87	0.3%	0.9%	-6.2%	-11.6%	KES/USD	138.30	0.0%	12.0%
Nigeria	1,909.72	-0.1%	1.5%	1.0%	3.6%	NGN/USD	461.00	-0.1%	2.9%
Saudi Arabia	11,184.57	-0.5%	-0.8%	-1.1%	6.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,971.25	0.9%	-2.8%	-2.2%	6.0%	ZAR/USD	19.77	2.7%	16.1%
Vietnam	1,062.15	0.1%	-0.6%	1.0%	5.7%	VND/USD	23,480.00	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	473.45	-0.3%	-0.8%	-2.2%	0.2%	Brent Crude (\$)	76.26	-2.7%	-11.2%
MSCI Frontier 100	1,085.55	-0.4%	-0.8%	-2.3%	-0.5%	Gold (\$)	1,943.70	-1.1%	6.4%
MSCI Emerging	964.01	-0.7%	-1.4%	-3.3%	0.8%	Copper (\$)	7,962.50	0.8%	-4.9%
MSCI World (USD)	2,796.86	0.3%	-1.6%	-1.4%	7.5%	Coffee (\$)	177.51	0.4%	13.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Total	249.00	6.9%	29.0%	179.71	Unilever	14.40	-8.3%	24.1%	33.21
UACN	9.40	4.4%	-8.3%	36.22	P Z Cussons	16.90	-6.1%	48.9%	30.64
Wema	4.00	2.6%	2.6%	1.31	Sterling	1.76	-2.2%	25.7%	3.84
Flour Mills	31.80	2.3%	12.0%	30.80	International Breweries	4.90	-2.0%	4.3%	9.02
Dangote Sugar	19.40	2.1%	20.9%	58.70	Transnational Corporation	2.90	-1.7%	156.6%	37.13
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%	10.23	Cap	19.75	15.25	29.5%	17.46
Wema	4.00	4.00	0.0%	1.31	Custodian	6.00	4.55	31.9%	1.63
Transnational Corporation	2.90	2.90	0.0%	37.13	Unilever	14.40	10.50	37.1%	33.21
Total	249.00	249.00	0.0%	179.71	Guaranty	26.90	18.00	49.4%	835.97
Seplat Petroleum	1200.00	1200.00	0.0%	7.21	Nestle	1148.00	764.90	50.1%	71.54

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.41	9.5%	-16.1%	0.00	Gulf Pharmaceutical Industries	0.89	-2.9%	-23.0%	0.01
Hayah Insurance Company	0.82	4.7%	-15.8%	0.01	Response Plus Holding	4.19	-2.6%	-32.3%	6.71
Easy Lease Motorcycle Rental	33.40	4.4%	-4.0%	7.45	Manazel	0.38	-2.3%	-4.6%	1.04
Methaq Takaful Insurance Compnay	0.70	3.4%	10.1%	0.05	Bayanat AI	4.27	-2.1%	-12.9%	8.98
GHITHA HOLDING	41.94	1.6%	-42.5%	13.75	National Corp for Tourism & Hotels	3.35	-2.1%	11.7%	0.24
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	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	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£)
Credit Agricole Egypt	12.61	5.7%	49.1%	22.18	Orascom Construction	104.05	-2.4%	8.4%	3.41
Taaleem Management Services	4.18	5.6%	4.5%	3.19	Ibsina Pharma	2.11	-2.3%	-2.3%	142.13
Edita Food Industries S.A.E	16.60	3.9%	19.5%	1.46	Ezz Steel	37.94	-2.2%	63.2%	27.52
Fawry For Banking Technology And Electronic Payment	5.70	1.2%	8.8%	62.24	Oriental Weavers	15.49	-2.2%	48.9%	13.41
E-finance For Digital and Financial Investments	17.89	1.0%	-5.9%	15.94	Eastern Company	17.66	-1.9%	19.5%	1.46
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	23.40	23.40	0.0%	12.74	Cleopatra Hospital Co.	4.64	3.81	21.8%	2.71
Sidi Kerir Petrochemicals	19.78	19.78	0.0%	34.25	T M G Holding	8.67	6.50	33.4%	5.07
Oriental Weavers	15.49	15.49	0.0%	13.41	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.31	1.62	42.6%	14.83
Orascom Construction PLC	104.05	104.05	0.0%	3.41	Taaleem Management Services	4.18	2.72	53.7%	3.19
Misir Fertilizers Production Company	167.57	167.57	0.0%	4.30	E-finance For Digital and Financial Investments	17.89	11.25	59.0%	15.94

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	176.25	1.0%	5.9%	163.656	Eicher Motors	3617.00	-0.9%	12.1%	231.05
Bajaj Finserv	1441.10	1.0%	-6.9%	178.49	Power Grid Corp Of India	236.20	-0.7%	10.5%	93.19
Tech Mahindra	1108.50	1.0%	9.1%	200.10	Grasim Industries	1688.90	-0.7%	-2.0%	139.50
Wipro	397.65	0.9%	1.2%	123.14	Sun Pharma Industries	938.75	-0.7%	-6.3%	113.70
Hcl Technologies	1125.70	0.9%	8.3%	108.08	Axis Bank	916.15	-0.5%	-1.9%	366.46
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	442.70	443.40	-0.2%	485.39	Infosys	1313.90	1185.30	10.8%	500.54
Bajaj Auto	4622.40	4651.40	-0.6%	123.82	Cipla	944.55	852.00	10.9%	120.06
Indusind Bank	1259.00	1275.90	-1.3%	204.55	UPL	681.00	607.50	12.1%	143.24
ONGC	165.45	169.00	-2.1%	177.99	SBI Life Insurance	1184.65	1051.55	12.7%	41.08
Britannia Inds.	4592.00	4705.45	-2.4%	99.58	Reliance Industries	2456.50	2180.00	12.7%	1031.12

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	26.30	9.6%	-16.5%	0.10	The Cooperative Bank of Kenya Ltd	11.15	-10.8%	-9.3%	6.68
Nation Media Group	16.60	6.4%	4.1%	25.56	Centum Investment Company Plc	8.22	-6.4%	-1.7%	0.31
Kenya Power & Lighting Limited	1.53	4.1%	-1.9%	0.77	Stanbic Holdings	97.25	-3.0%	-4.7%	0.56
Standard Chartered Bank Kenya Ltd	145.00	3.0%	1.6%	0.33	Safaricom Plc	15.05	-1.3%	-37.7%	344.73
Total Kenya Ltd	21.00	1.7%	-11.9%	0.02	Diamond Trust Bank Limited	44.95	-0.1%	-10.1%	0.37
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)
British American Tobacco Kenya Ltd	457.25	530.00	-13.7%	0.55	Diamond Trust Bank Ltd	44.95	44.00	2.2%	0.37
Standard Chartered Bank Kenya Ltd	145.00	171.00	-15.2%	0.33	Centum Investment Company Plc	8.22	8.00	2.8%	0.31
NCBA Group Plc	34.15	40.90	-16.5%	2.95	Equity Group Holdings Plc	36.80	35.80	2.8%	28.55
Stanbic Holdings	97.25	117.75	-17.4%	0.56	Nairobi Securities Exchange Plc	6.00	5.62	6.8%	0.03
Absa Bank Kenya	10.45	12.95	-19.3%	2.46	Kengen Limited	2.31	2.15	7.4%	0.18

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Ground Services Co.	31.45	8.5%	44.0%	81.81	Saudi Re for Cooperative Reinsurance Co.	18.94	-4.8%	38.2%	14.37
Qassim Cement Co.	72.40	5.4%	18.5%	23.40	Bupa Arabia for Coop Insurance Co.	177.00	-4.2%	23.1%	24.10
Jabal Omar Development Co.	25.00	4.1%	51.5%	366.23	Saudi Telecom Co.	42.65	-2.4%	16.5%	216.58
Allied Cooperative Insurance Group	17.24	3.9%	59.6%	58.44	Riyad Bank	33.65	-2.2%	5.8%	29.16
Alamar Foods Co.	130.80	3.5%	-5.8%	35.96	Saudi Investment Bank	17.28	-2.0%	-0.3%	4.03
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%	23.10	Al Kathiri Holding Co.	3.44	3.44	0.0%	7.48
Riyadh Cables Group Co.	61.20	61.20	0.0%	5.70	Alandalus Property Co.	18.54	18.54	0.0%	0.30
Naqi Water Co.	90.60	90.60	0.0%	48.30	Alkhabeer REIT Fund	6.76	6.76	0.0%	0.40
Nahdi Medical Co.	173.00	173.00	0.0%	26.41	Allied Cooperative Insurance Group	17.24	17.24	0.0%	58.44
Aldawaa Medical Services Co.	86.10	86.10	0.0%	91.95	Arabian Centres Co.	21.42	21.42	0.0%	25.80

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Cie Financiere Richemont SA	319128.00	4.0%	43.0%	88053.80	Vodacom Group Ltd	10876.00	-3.2%	-11.4%	27407.52
Anglo American PLC	55270.00	2.2%	-16.7%	91195.50	Sasol Ltd	23470.00	-2.9%	-12.9%	36143.80
Bid Corp Ltd	41783.00	2.1%	26.7%	61421.01	Capitec Bank Holdings Ltd	141163.00	-2.8%	-24.0%	43413.27
Glencore PLC	10125.00	2.0%	-11.2%	75228.75	Exxaro Resources Ltd	16301.00	-2.6%	-25.0%	14670.90
Investec Ltd	103600.00	1.6%	-3.6%	12017.60	Clicks Group Ltd	24218.00	-1.7%	-10.3%	17777.47
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)
Bid Corp Ltd	41783.00	42000.00	-0.5%	61421.01	MultiChoice Group	9990.00	9990.00	0.0%	12287.70
Reinet Investments SCA	41117.00	42454.00	-3.1%	9685.93	Exxaro Resources Ltd	16301.00	16301.00	0.0%	14670.90
Cie Financiere Richemont SA	319128.00	347987.00	-8.3%	88053.80	Vodacom Group Ltd	10876.00	10678.00	1.9%	27407.52
Gold Fields Ltd	28995.00	32652.00	-11.2%	87274.95	Sasol Ltd	23470.00	22136.00	6.0%	36143.80
AngloGold Ashanti Ltd	46431.00	55688.00	-16.6%	54788.58	Capitec Bank Holdings Ltd	141163.00	132856.00	6.3%	43413.27

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam Rubber Group JSC	16750.00	4.0%	21.4%	87.817,56	Sai Gon Thuong Tin Commercial	27000.00	-1.5%	20.0%	956.287,57
Petrovietnam Gas	94700.00	2.4%	-6.7%	57.342,00	Vietnam Prosperity	19200.00	-1.0%	7.3%	140.769,60
Vinamilk	67100.00	1.2%	-11.8%	87.358,34	Saigon Securities Inc	22500.00	-0.9%	27.1%	354.958,77
Vinhomes	55000.00	0.9%	14.6%	88.624,20	Military Commercial Bank	18450.00	-0.8%	7.9%	87.592,54
Vietcombank	93200.00	0.7%	16.5%	56.069,24	BaoViet Holdings	44100.00	-0.8%	-5.4%	16.978,05
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	93200.00	96000.00	-2.9%	56.069,24	BaoViet Holdings	44100.00	44100.00	0.0%	16.978,05
Bank for Inv. and Devp	43750.00	49950.00	-12.4%	28.670,90	Vietnam Rubber Group JSC	16750.00	16750.00	0.0%	87.817,56
Asia Commercial JS Bank	25100.00	29080.00	-13.7%	219.963,85	Masan Group Corp	72000.00	72000.00	0.0%	53.108,67
FPT Corp	83200.00	97944.43	-15.1%	110.773,88	Mobile World Inv. Corp	38000.00	38000.00	0.0%	56.094,93
Saigon Beer Alcohol Beverage Corp.	158000.00	197900.00	-20.2%	15.321,15	No Va Land Invest	13200.00	13200.00	0.0%	113.355,70

Email: research@fsdgroup.com • www.fsdgroup.com

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