

Daily Market Report

30 May 2023

JSE

JSE All-Share Index inched up by 0.03% and closed at 76,613.35 points on Monday, as the Resources and Industrials sectors recorded gains.

BRVM

BRVM composite Index was closed on Monday on account of Pentecost.

NSE

NGX All-Share Index was closed on Monday on account of National holiday.

EGX

EGX 30 Index increased by 0.47% and closed at 17,211.84 points on Monday, as the market gained LE 1 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.57% to close at 820.30 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.03%
BRVM Bourse Régionale des Valeurs Mobilières	↔	0.00%
NGX Nigerian Stock Exchange	↔	0.00%
EGX Egyptian Stock Exchange	▲	0.47%
ESG Casablanca Stock Exchange	▲	0.57%

African Markets

Nigeria: NGX 30 Index was closed on Monday on account of National holiday.

Egypt: EGX 30 Index increased by 0.47% and closed at 17,211.84 points on Monday, as the market gained LE 1 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index climbed by 1.68% and closed at 1,513.22 points on Monday. Nation Media Group and Centum Investment Company were the top gainers.

South Africa: JSE Top 40 Index inched up by 0.06% and closed at 71,444.19 points on Monday, as the Resources and Industrials sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	22.22%
Exchange Rate	₦ 461.45
INTERBANK RATES	
OPR	12.75 ↔
Overnight	13.25 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.44% to close at 9,412.27 points on Monday, as losses in the Financials, Health Care, and Industrials sectors pushed shares lower. MSCI UAE decreased by 0.45% to close at 380.86 points.

Vietnam: VN-30 Index increased by 0.89% to close at 1,070.27 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.99% to close at 632.11 points.

Saudi Arabia: Tadawul All Share Index inched down by 0.02% to close at 11,135.67 points on Monday, as losses in the Energy and Utilities sectors pushed shares lower. MSCI Saudi Arabia declined by 0.58% and closed at 1,483.55 points.

India: Nifty 50 Index increased by 0.47% to close at 18,598.65 points on Monday, as gains in the Auto, FMCG, and Media led shares higher. MSCI India increased by 0.45% to close at 2,073.85 points.

News

Nigeria:

NNPCL subsidiary rakes in N256bn revenue – Report
Reps raise limit on CBN loans
EIB supports Nigeria with Eur150m to boost economic growth

Kenya:

Interest on 182-day T-bill crosses 11 percent mark
Capital gains tax declines by 13pc despite tripling of rate
Kenya to scrap visa fees for Africa traders

Abu Dhabi:

UAE's Dana Gas raises its foreign ownership limit to 100%
ADNOC Drilling eyes over \$3bn revenue in 2023
Dubai Financial Market launches futures contract

Saudi Arabia:

Investments in Kingdom's special economic zones reach \$12.6bn
Saudi banks' profits surge 3.4% in April to \$1.55bn
Foreign investors in SEZs to get extra incentives for hiring Saudis

Egypt:

AfDB lowers avg. inflation rate forecast for next FY
EFCBC attracts EGP 2.15B projects in Africa for Egyptian contractors
Banque Misr secures \$260 mln loan from IFC to uplift MSMEs

South Africa:

Reserve Bank cautions about risks of capital outflows and sanctions
Glencore's Viterra in merger talks with US grain rival Bunge
Steinhoff gets approval for debt restructure

India:

FPIs invest over Rs 37,000 cr in May, highest in 6 months
Unemployment rate dips to 6.8% in January-March 2023
ONGC will invest Rs 1L cr for 2038 net zero target

Vietnam:

Hanoi's CPI grows 1.52% in five months
Vietnam invests over 316 million USD abroad in five months
Agro-forestry-aquatic product exports drop 11% in five months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,412.27	-0.4%	-0.4%	-3.9%	-7.8%	AED/USD	3.67	0.0%	0.0%
Egypt	17,211.84	0.5%	1.0%	-2.6%	17.9%	EGP/USD	30.90	0.1%	25.1%
India	18,598.65	0.5%	0.5%	3.0%	2.7%	INR/USD	82.59	0.0%	-0.2%
Kenya	1,513.22	1.7%	1.7%	-4.2%	-9.7%	KES/USD	138.45	0.1%	12.1%
Nigeria	1,915.50	0.0%	0.0%	1.3%	4.0%	NGN/USD	460.75	-0.2%	2.8%
Saudi Arabia	11,135.67	-0.02%	-0.4%	-1.5%	6.3%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,444.19	0.1%	0.1%	-1.6%	6.7%	ZAR/USD	19.67	0.0%	15.5%
Vietnam	1,070.27	0.9%	0.9%	1.8%	6.5%	VND/USD	23,472.50	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	476.37	0.5%	0.5%	-1.6%	0.9%	Brent Crude (\$)	76.95	0.0%	-10.4%
MSCI Frontier 100	1,096.96	0.6%	0.6%	-1.3%	0.6%	Gold (\$)	1,944.30	0.0%	6.5%
MSCI Emerging	971.75	-0.1%	-0.1%	-2.5%	1.6%	Copper (\$)	8,135.00	0.0%	-2.8%
MSCI World (USD)	2,830.43	0.1%	0.1%	-0.2%	8.8%	Coffee (\$)	172.49	-0.6%	10.5%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nascon	15.40	10.0%	38.7%	75.30	BUA Cement	88.00	-2.2%	-10.0%	72.87
UBA	9.30	6.3%	22.4%	529.10	Flour Mills	31.30	-1.6%	10.2%	85.62
Transnational Corporation	3.07	5.9%	171.7%	87.66					
UBN	7.40	5.0%	15.6%	4.96					
Access	11.40	3.6%	34.1%	581.17					
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%	14.60	Cap	20.00	15.25	31.1%	19.59
Wema	4.00	4.00	0.0%	3.20	Custodian	6.00	4.55	31.9%	2.59
UBN	7.40	7.40	0.0%	4.96	Unilever	14.45	10.50	37.6%	25.85
Transnational Corporation	3.07	3.07	0.0%	87.66	Nestle	1148.00	764.90	50.1%	97.95
Total	249.00	249.00	0.0%	87.42	Guaranty	27.50	18.00	52.8%	1116.30

*Market closed on 29/5

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ras Al Khaimah Poultry & Feeding Co.	1.95	7.1%	21.1%	0.00	Methaq Takaful Insurance Company	0.66	-4.9%	4.2%	0.00
APEX INVESTMENT	1.86	6.3%	-46.9%	6.70	Hayah Insurance Co.	0.78	-4.0%	-19.2%	0.03
Easy Lease Motorcycle Rental PJSC	33.20	3.8%	-4.6%	10.34	GHITHA HOLDING	40.64	-3.0%	-44.3%	11.94
Multiply Group	3.47	3.6%	-25.2%	89.28	First Abu Dhabi Bank	12.66	-2.6%	-26.0%	19.62
National Corporation for Tourism & Hotels	3.20	3.2%	6.7%	0.20	ADNOC Drilling Company	3.69	-2.1%	23.8%	26.01
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	Union Insurance Company	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 Company	1.50	1.50	0.0%	0.00
United Fidelity Insurance Company	1.60	1.60	0.0%	0.00	First Abu Dhabi Bank	12.66	12.66	0.0%	19.62

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Heliopolis Housing	9.70	11.8%	21.9%	92.72	Ibnsina Pharma	2.18	-1.8%	0.9%	66.51
Orascom Construction PLC	115.11	7.5%	20.0%	87.74	Egyptian Kuwaiti Holding-EGP	39.29	-1.7%	24.7%	17.29
T M G Holding	9.21	5.1%	-7.8%	22.74	Oriental Weavers	15.14	-1.5%	45.6%	13.73
Palm Hills Development Company	1.97	3.7%	0.5%	40.01	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.29	-1.3%	-22.9%	13.25
Sidi Kerir Petrochemicals	20.15	3.1%	53.6%	40.76	Telecom Egypt	23.99	-1.0%	-22.9%	13.25
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	23.99	23.99	0.0%	24.24	Cleopatra Hospital Company	4.60	3.81	20.7%	26.03
Sidi Kerir Petrochemicals - SIDPEC	20.15	20.15	0.0%	40.76	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic-Rameda	2.29	1.62	41.4%	13.25
Oriental Weavers	15.14	15.14	0.0%	13.73	T M G Holding	9.21	6.50	41.7%	22.74
Orascom Construction PLC	115.11	115.11	0.0%	87.74	Taaleem Management Services	3.99	2.72	46.7%	0.67
Misir Fertilizers Production Company - Mopco	166.62	166.62	0.0%	3.90	E-finance For Digital and Financial Investments	17.61	11.25	56.5%	3.34

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1325.05	3.4%	6.1%	8222.804	ONGC	159.00	-2.9%	8.3%	6861.81
Titan Company	2813.95	2.6%	8.3%	3089.16	Divi's Laboratories Limited	3474.00	-1.1%	1.8%	1257.46
Coal India	246.00	1.9%	9.3%	1981.75	Power Grid Corp Of India	234.90	-1.0%	9.9%	2413.77
SBI Life Insurance	1215.00	1.6%	-1.3%	1670.00	HCL Technologies	1127.80	-1.0%	8.5%	1457.94
Grasim Industries	1715.00	1.6%	-0.5%	1131.67	Maruti Suzuki India	9334.00	-0.7%	11.2%	2219.13
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Titan Company	2813.95	2821.80	-0.3%	3089.16	Infosys	1315.00	1185.30	10.9%	5818.01
ITC	448.95	451.80	-0.6%	8903.38	Cipla	953.10	852.00	11.9%	1659.79
Ultratech Cement	7849.00	7920.00	-0.9%	1647.16	Tata Consultancy Svs.	3320.70	2926.10	13.5%	4035.02
Indusind Bank	1283.35	1295.00	-0.9%	3847.14	UPL	690.10	607.50	13.6%	770.06
Bajaj Auto	4609.00	4664.55	-1.2%	1395.74	Wipro	400.00	352.00	13.6%	1599.22

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	19.65	7.7%	23.2%	0.86	British American Tobacco Kenya Ltd	408.00	-9.1%	-11.3%	14.40
Centum Investment Company	8.76	6.6%	4.8%	0.23	Total Kenya Ltd	20.50	-1.7%	-14.0%	0.01
The Cooperative Bank of Kenya Ltd	12.00	5.3%	-2.4%	48.95	Bamburi Cement Ltd	26.00	-0.8%	-17.5%	0.16
Stanbic Holdings	102.25	4.1%	0.2%	0.09	Nairobi Securities Exchange Plc	5.98	-0.3%	-11.8%	0.03
Kenya Power & Lighting Limited	1.55	2.6%	-0.6%	3.03	Diamond Trust Bank Limited	44.90	-0.2%	-10.2%	1.81
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)
Standard Chartered Bank Kenya Ltd	148.50	171.00	-13.2%	0.33	British American Tobacco Kenya Ltd	408.00	400.00	2.0%	14.40
Stanbic Holdings	102.25	117.75	-13.2%	0.09	Diamond Trust Bank Limited	44.90	44.00	2.0%	1.81
The Cooperative Bank of Kenya Ltd	12.00	14.00	-14.3%	48.95	Equity Group Holdings Plc	37.40	35.80	4.5%	1.31
NCBA Group Plc	35.00	40.90	-14.4%	9.94	Nairobi Securities Exchange Plc	5.98	5.62	6.4%	0.03
Absa Bank Kenya	11.00	12.95	-15.1%	0.98	Kengen Limited	2.29	2.15	6.5%	0.21

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Yanbu Cement Co.	40.95	8.1%	14.7%	38.31	Astra Industrial Group	72.20	-3.2%	39.7%	14.43
AYYAN Investment Co	19.08	6.7%	35.1%	47.16	Leejam Sports Co.	114.80	-3.2%	36.7%	38.90
Saudi Pharmaceutical Industries and Medical Appliances Corp.	40.60	5.5%	86.4%	82.93	Naseej International Trading Co	48.00	-3.0%	16.2%	15.18
Saudi Company for Hardware	35.20	4.1%	29.4%	17.98	Saudi Research and Marketing Group	185.40	-2.9%	1.9%	7.81
Saudi Arabian Amiantit Co.	43.60	3.9%	34.2%	42.12	Al Moammar Information Systems Co.	130.20	-2.8%	39.7%	5.07
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	60.80	60.80	0.0%	26.42	Al Kathiri Holding Co.	3.41	3.41	0.0%	6.33
Riyadh Cables Group Co.	60.00	60.00	0.0%	6.33	Alandalus Property Co.	18.66	18.66	0.0%	1.02
Naqi Water Co.	90.20	90.20	0.0%	39.83	Alkhabeer REIT Fund	6.79	6.79	0.0%	0.36
Nahdi Medical Co.	172.40	172.40	0.0%	14.53	Allied Cooperative Insurance Group	17.38	17.38	0.0%	10.16
Aldawaa Medical Services Co.	86.70	86.70	0.0%	19.11	Arabian Centres Co.	21.16	21.16	0.0%	15.02

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
BHP Group Ltd	56304.00	1.7%	6.9%	12634.05	Prosus NV	133958.00	-1.8%	13.7%	79212.04
Anglo American PLC	57122.00	1.4%	-13.9%	33150.18	Naspers Ltd	309386.00	-1.6%	9.5%	109142.10
Vodacom Group Ltd	10955.00	1.3%	-10.7%	6283.79	Reinet Investments SCA	41047.00	-1.5%	25.4%	3325.63
Bid Corp Ltd	41983.00	1.2%	27.3%	31074.98	Old Mutual Ltd	1071.00	-1.3%	2.4%	10377.99
Bidvest Group Ltd	24163.00	1.2%	12.7%	10797.48	Mr Price Group Ltd	12996.00	-1.1%	-18.2%	8826.62
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)
Bid Corp Ltd	41983.00	42000.00	-0.04%	31074.98	MultiChoice Group	9846.00	9846.00	0.0%	10633.68
Reinet Investments SCA	41047.00	42454.00	-3.3%	3325.63	Exxaro Resources Ltd	16327.00	16301.00	0.2%	7196.78
Cie Financiere Richemont SA	327878.00	347987.00	-5.8%	51673.57	Vodacom Group Ltd	10955.00	10678.00	2.6%	6283.79
Gold Fields Ltd	28876.00	32652.00	-11.6%	24144.09	Capitec Bank Holdings Ltd	140363.00	132856.00	5.7%	17883.65
AngloGold Ashanti Ltd	46487.00	55688.00	-16.5%	22748.41	Sasol Ltd	23532.00	22136.00	6.3%	12584.91

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam Rubber Group	18200.00	5.8%	31.9%	107.879,58	Ho Chi Minh City Devp	18800.00	-3.6%	17.9%	43.104,49
Saigon Securities Inc	23400.00	3.8%	32.2%	406.204,49	Masan Group Corp	71600.00	-0.6%	-23.0%	34.676,86
Phat Dat Real Estate Development Corp	13700.00	2.2%	0.7%	80.678,93	Saigon Beer Alcohol Beverage Corp.	155300.00	-0.1%	-7.0%	14.145,78
Sai Gon Thuong Tin Commercial	27700.00	1.8%	23.1%	275.212,82					
Hoa Phat Group JSC	21450.00	1.7%	19.2%	236.887,23					
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	93100.00	96000.00	-3.0%	55.299,44	BaoViet Holdings	43950.00	43950.00	0.0%	24.216,84
Bank for Inv. and Devp	43900.00	49950.00	-12.1%	29.281,44	Masan Group Corp	71600.00	71600.00	0.0%	34.676,86
Asia Commercial JS Bank	25150.00	29080.00	-13.5%	415.849,74	Mobile World Inv. Corp	38700.00	38700.00	0.0%	86.995,04
FPT Corp	83100.00	97944.43	-15.2%	73.245,68	No Va Land Invest	13050.00	13050.00	0.0%	184.660,66
Saigon Beer Alcohol Beverage Corp.	155300.00	197900.00	-21.5%	14.145,78	Phat Dat Real Estate Development Corp	13700.00	13700.00	0.0%	80.678,93

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