

Daily Market Report

5 February 2024

JSE

JSE All-Share Index was down by 0.12% and closed at 74,381.96 points on Friday, as the Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index increased by 0.23% and closed at 207.88 points on Friday, with Sicom Côte d'Ivoire and Unilever Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index climbed by 1.57% to close at 104,421.23 on Friday, as the Insurance, Banking, and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index fell by 3.03% and closed at 27,573.50 points on Sunday, as the market lost LE 82 billion market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index inched down by 0.09% to close at 921.55 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.12%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.23%
NGX Nigerian Stock Exchange	▲	1.57%
EGX Egyptian Stock Exchange	▼	3.03%
ESG Casablanca Stock Exchange	▼	0.09%

African Markets

Nigeria: NGX 30 Index climbed by 1.61% to close at 3,931.01 points on Friday. Transcorp and Sterling were the top gainers.

Egypt: EGX 30 Index fell by 3.03% and closed at 27,573.50 points on Sunday, as the market lost LE 82 billion market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased marginally by 0.04% and closed at 1,512.56 points on Friday. Diamond Trust Bank Limited and East African Breweries Limited were the top gainers.

South Africa: JSE Top 40 Index was down by 0.14% and closed at 67,838.80 points on Friday, as the Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	28.92%
Exchange Rate (I&E window)	₦ 1435.53
INTERBANK RATES	
OPR	20.20 ▼
Overnight	21.20 ▼

Other Emerging Markets

Abu Dhabi: ADX Index was down by 0.14% to close at 9,456.25 points on Friday, as losses in the Telecommunications, Industrials, and Energy sectors pushed shares lower. MSCI UAE increased by 0.37% to close at 401.03 points.

Vietnam: VN-30 Index was up by 0.12% to close at 1,174.76 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam declined by 0.68% to close at 436.19 points.

Saudi Arabia: Tadawul All Share Index increased by 0.41% to close at 11,962.72 points on Sunday, as gains in the Insurance, Transportation, and Food & Beverages sectors led shares higher. MSCI Saudi Arabia increased by 0.35% and closed at 1,553.52 points.

India: Nifty 50 Index increased by 0.72% to close at 21,853.80 points on Friday, as gains in the IT, Metal, and PSU Bank sectors led shares higher. MSCI India decreased by 0.45% to close at 2,262.62 points.

News

Nigeria:

Nigeria-China trade hits \$23bn, says envoy
Transcorp Hotels full year profit rises 132.9% to N6.1B
FG seeks N146bn for Marina shoreline repairs

Kenya:

Devolved units get Sh7.3bn grant for climate change
State nets Sh26.8bn from housing levy amid legal row
Industrial property developer gets Sh4.8bn IFC loan for expansion

Abu Dhabi:

DEWA's EV Green Chargers witnessed 59% surge in service usage in 2023
Abu Dhabi real estate transactions hit \$1.36bln in January 2024
Athens and Abu Dhabi ink memorandum for data center investments in Greece

Saudi Arabia:

SNB Capital Co., Al-Shegry Investment Group launch \$266m real estate fund
Saudi Arabia signs deal with Leonardo to boost aerospace sector
Siemens, Samsung, ACWA in race for 7.2GW Saudi projects

Egypt:

Egypt's external bond portfolio reaches \$33.96B by end of 2023
CBE to launch \$1bn tender for local treasury bills in US currency
Egypt's outstanding balances of local T-bonds, bills reach LE 4.962T by end of 2023

South Africa:

Vodacom's group operations pass 200-million customer high
Sanlam's R6.5bn bid for Assupol
Gridlock at Durban port robs SA of much-needed export receipts

India:

FPIs invest nearly Rs 20,000 crore in debt in Jan, over 6-year
Adani's \$1.2 billion copper plant to boost India's metal production
Indian startups raised \$732 million across 107 deals in January

Vietnam:

Bà Rịa-Vũng Tàu seeks investment for 110 projects
HCM City aims for 6.5% growth rate in Q1
Vicostone's 2023 revenue hits over \$178 million

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,456.25	-0.1%	0.0%	-0.5%	-1.3%	AED/USD	3.67	0.0%	0.0%
Egypt	27,573.50	-3.0%	-3.0%	-2.5%	11.0%	EGP/USD	30.85	-0.2%	-0.4%
India	21,853.80	0.7%	0.0%	0.6%	0.6%	INR/USD	83.00	0.1%	-0.3%
Kenya	1,512.56	0.04%	0.0%	0.2%	0.8%	KES/USD	160.50	-0.3%	2.2%
Nigeria	3,931.01	1.6%	0.0%	3.3%	40.9%	NGN/USD	1,435.53	-1.8%	67.9%
Saudi Arabia	11,962.72	0.4%	0.4%	1.4%	-0.04%	SAR/USD	3.75	0.0%	0.0%
South Africa	67,838.80	-0.1%	0.0%	-0.3%	-3.8%	ZAR/USD	18.90	1.7%	3.3%
Vietnam	1,174.76	0.1%	0.0%	0.7%	3.8%	VND/USD	24,350.00	-0.2%	0.4%

MSCI Emerging Markets

MSCI Frontier	510.84	-0.3%	0.0%	-0.1%	0.8%	Brent Crude (\$)	77.33	-1.7%	0.4%
MSCI Frontier 100	1,158.57	-0.6%	0.0%	-0.7%	-0.1%	Gold (\$)	2,053.70	-0.8%	-0.9%
MSCI Emerging	988.21	0.6%	0.0%	1.3%	-3.5%	Copper (\$)	8,482.00	-0.6%	-0.9%
MSCI World (USD)	3,247.64	0.6%	0.0%	1.3%	2.5%	Coffee (\$)	185.24	-0.2%	18.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	15.40	10.0%	77.8%	834.84	United Capital PLC	23.00	-0.9%	0.0%	450.02
Sterling	6.60	10.0%	53.8%	86.64	Stanbic IBTC	64.95	-0.1%	-6.7%	36.39
P Z Cussons	36.40	10.0%	36.3%	20.99					
Cadbury	20.00	9.9%	5.3%	14.44					
FBNH	26.20	9.9%	11.3%	8877.61					
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	10.25	10.25	0.0%	356.61	Nestle	1100.00	764.90	43.8%	2099.76
Zenith	39.50	39.50	0.0%	1259.02	Cap	24.00	15.25	57.4%	12.02
Wema	10.85	10.85	0.0%	59.37	Nigerian Breweries	39.00	24.40	59.8%	75.95
Unilever	19.50	19.50	0.0%	15.38	Unilever	19.50	10.50	85.7%	15.38
UBA	28.00	28.00	0.0%	1422.41	International Breweries	5.20	2.70	92.6%	15.31

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement Co.	0.44	5.0%	-4.3%	0.01	Union Insurance Co	0.54	-10.0%	-16.9%	0.002
RAK Properties	1.36	4.6%	16.2%	26.21	Gulf Pharmaceutical Industries	1.12	-4.3%	45.6%	1.75
Borouge PLC	2.48	2.9%	0.4%	16.13	Sudatel Telecom Group Co Ltd	0.28	-2.4%	-8.5%	0.00
National Corp for Tourism & Hotels	3.16	2.6%	33.9%	1.44	Bank of Sharjah	0.60	-2.0%	-8.4%	0.69
Al Yah Satellite Communications Company	2.28	1.8%	-12.6%	4.15	National Marine Dredging Co.	30.16	-1.8%	1.2%	37.23
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 Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Al Wathba National Insurance Co.	5.20	5.20	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Sharjah Insurance Co	1.35	1.35	0.0%	0.00
Finance House	2.14	2.14	0.0%	0.00	Ras Alkhaima National Insurance Co.	3.70	3.70	0.0%	0.00
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Al Dhafra Insurance Co.	4.41	4.41	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£)
Heliopolis Housing	3.33	11.0%	-68.0%	145.04	Alexandria Containers and goods	57.25	-11.2%	12.6%	82.77
Juhayna Food Industries	19.49	10.1%	24.4%	10.28	Oriental Weavers	22.25	-9.6%	31.6%	120.97
Palm Hills Development Company	3.46	7.5%	30.1%	92.87	Sidi Kerir Petrochemicals - SIDPEC	37.56	-9.5%	29.2%	190.95
Madinet Masr For Housing and Development	4.22	6.8%	3.9%	62.30	Abou Kir Fertilizers	91.31	-7.7%	8.7%	201.01
EFG Holding	43.00	4.9%	163.5%	94.76	Abu Dhabi Islamic Bank- Egypt	44.62	-4.7%	11.6%	14.67
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	36.89	36.89	0.0%	28.01	Ezz Steel	5.19	5.19	0.0%	20.53
T M G Holding	34.00	34.00	0.0%	182.29	Heliopolis Housing	3.33	3.33	0.0%	145.04
Sidi Kerir Petrochemicals - SIDPEC	37.56	37.56	0.0%	190.95	Misir Fertilizers Production Company - Mopco	79.80	73.73	8.2%	144.70
QALA For Financial Investments	2.72	2.72	0.0%	66.40	Commercial International Bank	32.60	22.49	45.0%	54.93
Palm Hills Development Company	3.46	3.46	0.0%	92.87	Egyptian Kuwaiti Holding-EGP	31.94	19.00	68.1%	116.56

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	557.00	9.6%	23.6%	2126.12	Eicher Motors	3835.00	-2.5%	-7.4%	335.52
Power Grid Corp Of India	278.00	4.6%	17.2%	937.22	Axis Bank	1067.70	-1.5%	-3.1%	934.97
ONGC	257.15	3.8%	25.4%	778.62	HDFC Life Insurance Company Ltd	578.90	-1.4%	-10.5%	175.12
Adani Ports And Sez.	1262.50	3.6%	23.2%	1326.69	Hdfc Bank	1445.90	-1.4%	-15.4%	3279.41
NTPC	332.55	3.3%	6.9%	1066.92	HUL	2452.00	-0.9%	-8.0%	481.85
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	7750.00	7797.50	-0.6%	153.12	UPL	533.00	526.50	1.2%	226.07
Tata Consultancy Svs.	3959.20	3984.40	-0.6%	1114.91	HUL	2452.00	2365.45	3.7%	481.85
Sun Pharma Industries	1422.55	1438.90	-1.1%	251.84	Hdfc Bank	1445.90	1380.25	4.8%	3279.41
Power Grid Corp Of India	278.00	281.40	-1.2%	937.22	Asian Paints	2936.35	2694.00	9.0%	553.94
Reliance Industries	2913.00	2949.80	-1.2%	2862.83	Kotak Mahindra Bank	1824.35	1643.50	11.0%	924.56

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	48.95	6.4%	8.7%	0.50	Centum Investment Company Plc	8.26	-3.5%	-1.7%	0.34
East African Breweries Limited	113.50	3.9%	-0.4%	9.98	Bamburi Cement Limited	38.55	-3.0%	7.5%	0.57
Total Kenya Ltd	17.65	3.8%	-1.9%	0.01	The Cooperative Bank of Kenya Ltd	12.00	-0.8%	5.3%	1.56
Kenya Reinsurance Corporation Ltd	1.86	2.8%	-1.1%	0.06	British American Tobacco Kenya Ltd	420.00	-0.4%	3.1%	0.04
KCB Group Plc	20.40	2.3%	-6.8%	6.11					
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	162.50	171.00	-5.0%	1.90	Kengen Limited	1.97	1.96	0.5%	0.37
Bamburi Cement Limited	38.55	42.00	-8.2%	0.57	Centum Investment Company Plc	8.26	8.00	3.3%	0.34
Absa Bank Kenya	11.85	12.95	-8.5%	0.57	British American Tobacco Kenya Ltd	420.00	400.00	5.0%	0.04
NCBA Group Plc	37.70	41.70	-9.6%	0.54	Nairobi Securities Exchange Plc	6.00	5.54	8.3%	0.01
The Cooperative Bank of Kenya Ltd	12.00	14.00	-14.3%	1.56	Diamond Trust Bank Limited	48.95	44.00	11.3%	0.50

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
MBC Group Co.	61.40	9.8%	0.0%	284.94	Ades Holding Co	19.94	-2.9%	-16.9%	345.97
Saudi Chemical Co.	4.94	9.5%	14.4%	32.18	Etihad Atheeb Telecom Co.	182.40	-2.5%	7.5%	77.00
Middle East Healthcare Co.	114.00	5.4%	29.1%	128.47	Arabian Drilling Co.	170.00	-2.1%	-11.0%	90.29
Saudi Real Estate Co.	19.10	5.0%	19.8%	41.86	Al-Babtain Power and Telecom Co.	28.90	-1.9%	5.1%	7.13
Saudi Arabia Refineries Co.	91.20	5.0%	-1.9%	25.24	East Pipes Integrated Company for Industry	84.70	-1.9%	3.9%	21.60
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)
Saudi Aramco Base Oil Co.	147.00	147.00	0.0%	17.62	Dar Alarkan Real Estate Development Co.	12.80	12.80	0.0%	137.36
Arabian Drilling Co.	170.00	170.00	0.0%	90.29	Riyadh Cement Co	28.95	28.95	0.0%	4.23
Alinma Hospitality REIT Fund	8.95	8.95	0.0%	2.70	Abdullah Al Othaim Markets Co.	13.70	13.70	0.0%	4.69
Riyadh Cables Group Co.	104.80	104.80	0.0%	23.18	Abdulmohsen Alhokair Group for Tourism and Development	2.75	2.75	0.0%	11.73
Retal Urban Development Co.	8.76	8.76	0.0%	3.87	Advanced Petrochemical Co.	38.95	38.95	0.0%	14.58

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	324300.00	2.7%	4.4%	164948.71	MultiChoice Group	9030.00	-4.9%	11.5%	39190.20
British American Tobacco PLC	56349.00	2.3%	4.4%	32715.10	Gold Fields Ltd	29261.00	-3.5%	-0.4%	121140.54
Prosus NV	57436.00	2.0%	2.8%	58010.36	Northam Platinum Holdings Ltd	12396.00	-2.8%	-11.7%	15618.96
Standard Bank Group Ltd	20133.00	1.5%	-3.3%	67848.21	Exxaro Resources Ltd	18581.00	-2.5%	-10.4%	13232.46
Anheuser-Busch InBev SA/NV	117987.00	1.5%	-2.3%	22411.63	Reinet Investments SCA	45901.00	-2.1%	-2.5%	19105.37
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)
Anheuser-Busch InBev SA/NV	117987.00	118559.00	-0.5%	22411.63	Sasol Ltd	15948.00	15912.00	0.2%	30939.12
Bid Corp Ltd	47380.00	47807.00	-0.9%	37923.43	Nedbank Group Ltd	21542.00	21501.00	0.2%	15501.84
Remgro Ltd	15632.00	15906.00	-1.7%	11194.54	Growthpoint Properties Ltd	1190.00	1185.00	0.4%	42423.50
Aspen Pharmacare Holdings Ltd	19279.00	19648.00	-1.9%	10300.00	Anglo American PLC	44229.00	43475.00	1.7%	37196.15
Reinet Investments SCA	45901.00	47249.00	-2.9%	19105.37	Mondi PLC	33150.00	32342.00	2.5%	30194.68

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam Rubber Group JSC	24600.00	2.7%	16.0%	139047.09	Investment & Industrial Development JS Corp.	64500.00	-2.3%	2.5%	44238.48
Mobile World Inv. Corp	47400.00	2.6%	10.7%	560724.30	Tien Phong Commercial Joint Stock Bank	17500.00	-2.0%	0.6%	162218.08
Ho Chi Minh City Devp	22350.00	2.5%	10.1%	205209.17	Viet Nam International Commercial Joint Stock Bank	20250.00	-1.9%	3.3%	153017.67
FPT Corp	102000.00	2.1%	6.1%	291827.36	Vincom Retail	22300.00	-1.6%	-4.3%	146288.75
Asia Commercial JS Bank	26250.00	1.0%	9.8%	379991.75	Saigon-Hanoi Commercial Bank	11450.00	-1.3%	6.0%	436333.20
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
FPT Corp	102000.00	102000.00	0.0%	291827.36	BaoViet Holdings	41000.00	41000.00	0.0%	6885.94
Vietcombank	90300.00	96000.00	-5.9%	65858.07	Petrovietnam Gas	75200.00	75200.00	0.0%	50909.49
Bank for Inv. and Devp	46900.00	49950.00	-6.1%	91532.71	Masan Group Corp	65400.00	65400.00	0.0%	104954.63
Asia Commercial JS Bank	26250.00	29080.00	-9.7%	379991.75	Mobile World Inv. Corp	47400.00	47400.00	0.0%	560724.30
Saigon-Hanoi Commercial Bank	11450.00	13600.00	-15.8%	436333.20	Saigon Beer Alcohol Beverage Corp.	57000.00	57000.00	0.0%	31160.13

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