

Daily Market Report

19 April 2024

JSE

JSE All-Share Index increased by 0.38% to close at 73,271.43 points on Thursday as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite decreased by 0.10% to close at 219.14 points on Thursday with Nsia Banque Côte d'Ivoire and BICI Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index decreased by 0.06% to close at 99,845.91 points on Thursday as the Banking sector recorded losses.

EGX

EGX 30 Index decreased by 4.50% and closed at 28,332.65 points on Thursday, as market lost LE 88 billion of market cap amid Foreign selling

ESG

Casablanca ESG 10 Index increased by 0.33% to close at 970.86 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.38%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.10%
NGX Nigerian Stock Exchange	▼	0.06%
EGX Egyptian Stock Exchange	▼	4.50%
ESG Casablanca Stock Exchange	▲	0.33%

African Markets

Nigeria: NGX 30 Index decreased 0.01% and closed at 3,700.44 points on Thursday. United Capital and Guaranty were the top losers.

Egypt: EGX 30 Index decreased by 4.50% and closed at 28,332.65 points on Thursday, as market lost LE 88 billion of market cap, amid Foreign selling

Kenya: NSE 20 Index decreased by 0.29% and closed at 1,698.26 points on Thursday. Kenya Reinsurance Corporation Ltd and Kenya Power & Lighting Limited were the top losers.

South Africa: JSE Top 40 increased by 0.43% and closed at 67,189.65 points on Thursday, as the Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	33.20%
Exchange Rate (I&E window)	₦1,154.08
INTERBANK RATES	
OPR	30.21 ▼
Overnight	31.30 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.19% to close at 9,182.47 points on Thursday, as gains in the Telecommunication Service, Materials and Health Care sectors pushed shares higher. MSCI UAE increased by 0.42% to close at 385.50 points.

Vietnam: VN-30 Index closed on Wednesday on account of the Hung King's Festival.

Saudi Arabia: Tadawul All Share Index increased by 0.29% to close at 12,502.35 points on Thursday, as gains in Utilities, Pharma Biotech & Life Science and Telecommunication sectors pushed shares higher. MSCI Saudi Arabia increased by 0.38 % to close at 1,575.11 points.

India: Nifty 50 index decreased by 0.69% to close at 21,995.85 on Thursday, as losses in the Health Care, Oil & Gas, and FMCG sectors dragged shares lower. MSCI India decreased by 0.52% to close at 2,345.56.

News

Nigeria:

Nigeria, China Share Strategies on Inland Waterways Development
CBN reduces banks' LDR to 50%
Nigeria's debt-to-GDP ratio to reach 46.6% in 2024 — IMF

Kenya:

Co-op Bank lends Sh499m to its brokerage subsidiary
Standoff as community fights to buy Lipton Tea assets
Rubis inks deal to operate National Oil in rescue plan

Abu Dhabi:

Abu Dhabi's E7 Group signs \$17.7mln in contracts across Middle East, Africa
Abu Dhabi National Ins. acquires 51% of Allianz Saudi Fransi Ins. for \$133mln
UAE Costa Rica inaugurate new trade investment era under CEPA

Saudi Arabia:

Saudi EXIM Bank inks deal with Swiss counterpart to elevate trade exchange
Spanish inv. in Saudi Arabia exceeds \$3bn
ACWA Power, IRENA join hands to accelerate global renewable energy transition

Egypt:

Transport Min. discusses progress on supplying new railway carriages with Hungarian co
Egypt's SCZONE welcomes Zhejiang Province delegation for trade talks
Egypt looks forward to mobilizing sustainable finance for Africa's public health

South Africa:

Canal+ buys more shares in MultiChoice
MTN boosts Huawei ties with tech lab
Alex Forbes launches foray into R500bn discretionary fund management market

India:

Adani Group releases Rs 26,500 crore pledged shares in FY24
Tata plans JLR EV imports to India
Tata Communications dials up AI compute spends as Nvidia deal advances

Vietnam:

Viet Nam earns \$1.43b from rice exports in Q1
Vietnam Airlines Sun Group promotes Vietnam's tourism in RoK
Vietnam and Australia cooperate in developing a competitive electricity market

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,182.47	0.2%	0.04%	-0.5%	-4.1%	AED/USD	3.67	0.01%	-0.003%
Egypt	28,332.65	-4.5%	-4.5%	5.4%	14.1%	EGP/USD	48.34	-0.5%	56.0%
India	21,995.85	-0.7%	-2.3%	-1.5%	1.2%	INR/USD	83.55	-0.1%	0.4%
Kenya	1,698.26	-0.3%	-1.5%	-3.1%	13.1%	KES/USD	133.00	0.4%	-15.3%
Nigeria	3,700.44	-0.01%	-2.5%	-4.6%	32.6%	NGN/USD	1,154.08	7.6%	27.2%
Saudi Arabia	12,502.35	0.3%	0.3%	0.8%	4.5%	SAR/USD	3.75	0.01%	0.03%
South Africa	67,189.65	0.4%	-2.9%	-1.7%	-4.7%	ZAR/USD	19.17	0.9%	4.7%
Vietnam	1,210.74	0.0%	-5.8%	-6.6%	7.0%	VND/USD	25,405.00	0.0%	4.8%

MSCI Emerging Markets

MSCI Frontier	506.60	-0.1%	-2.9%	-4.7%	-0.1%	Brent Crude (\$)	87.11	-0.2%	13.1%
MSCI Frontier 100	1,100.52	-0.2%	-3.1%	-4.8%	-5.1%	Gold (\$)	2,398.00	0.4%	15.7%
MSCI Emerging	1,018.59	0.6%	-2.2%	-2.1%	-0.5%	Copper (\$)	9,734.50	1.6%	13.7%
MSCI World (USD)	3,280.10	-0.03%	-2.1%	-4.6%	3.5%	Coffee (\$)	235.5	4.6%	33.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guinness	55.00	10.0%	-16.7%	15.60	United Capital	18.10	-9.7%	-21.3%	45.87
Transnational Corporation	14.00	2.9%	61.7%	326.65	Guaranty	34.35	-3.9%	-15.2%	1141.95
Zenith	36.00	1.7%	-6.9%	795.98	Fidelity	8.70	-2.2%	-19.8%	168.29
Wema	7.15	1.4%	27.7%	19.65	FCMB	7.20	-2.0%	-2.7%	14.43
Sterling	4.25	1.2%	-0.9%	11.83	Access	17.25	-0.9%	-25.5%	766.17
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Geregu Power	1000.00	1000.00	0.0%	662.22	Nigerian Breweries	28.05	24.40	15.0%	7.42
BUA Foods	379.90	379.90	0.0%	1.47	Nestle	900.00	764.90	17.7%	8.33
FCMB	7.20	7.20	0.0%	14.43	Unilever	14.00	10.50	33.3%	32.07
Zenith	36.00	36.00	0.0%	795.98	Cap	24.00	15.25	57.4%	1.62
Wema	7.15	7.15	0.0%	19.65	International Breweries	4.50	2.70	66.7%	0.59

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Corporation for Tourism & Hotels	3.20	6.7%	35.6%	1.07	OORED00	10.32	-9.3%	3.2%	0.08
ESHRAQ Investments	0.30	4.2%	-32.6%	34.82	FOODCO National Foodstuff	1.24	-8.8%	-18.4%	0.00
Manazel	0.31	3.3%	-10.3%	3.75	Easy Lease Motorcycle Rental	31.20	-5.2%	-0.3%	17.20
GHITHA Hldg	37.80	2.3%	-10.8%	18.45	Presight AI Hldg	2.50	-4.2%	15.7%	18.37
Abu Dhabi Islamic Bank	11.16	2.2%	10.3%	48.53	Multiply Group	2.49	-3.9%	-21.7%	62.53
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 Wathba National Insurance Co.	5.20	5.20	0.0%	0.00	Sawaeed Holding P.J.S.C	6.78	6.78	0.0%	0.00
Al Buhaira National Ins .Co.	3.00	3.00	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Fujairah National Ins. Co.	210.00	210.00	0.0%	0.00	Al Dhafra Ins Co.	4.41	4.41	0.0%	0.00
Finance House	2.14	2.14	0.0%	0.00	Abu Dhabi Ports Co.	5.43	5.41	0.4%	4.63
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Alpha Dhabi Hldg	15.14	15.00	0.9%	88.45

Egypt*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
					Sidi Kerir Petrochemicals	31.75	-9.0%	9.2%	154.44
					Fawry For Banking Technology and Electronic Payment	7.10	-8.4%	28.9%	124.30
					Oriental Weavers	20.27	-8.2%	19.9%	89.92
					E-finance For Digital and Financial Inv.	22.97	-8.2%	31.3%	31.90
					Ibsina Pharma	2.66	-8.0%	-15.3%	35.38
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£)
Misr Fertilizers Production Company	52.50	52.50	0.0%	97.30	Alexandria Mineral Oils Company	7.80	6.95	12.2%	23.98
Commercial International Bank	80.00	80.00	0.0%	422.97	Egyptian Kuwaiti Holding-EGP	40.00	33.00	21.2%	25.09
QALA For Financial Investments	3.31	3.66	-9.6%	402.43	EFG Holding	17.10	13.90	23.0%	102.98
Telecom Egypt	37.50	42.66	-12.1%	107.49	Heliopolis Housing	10.44	7.95	31.3%	88.91
Egyptian International Pharmaceuticals	44.98	53.49	-15.9%	33.54	Belton Financial Holding	3.34	2.38	40.3%	250.08

*No gainers on 18/4

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	1265.50	4.0%	22.6%	2510.48	Apollo Hospitals Enterprise Ltd	6100.00	-3.7%	6.9%	320.29
Power Grid Corp Of India	281.30	2.6%	18.6%	1440.64	Nestle India Limited	2471.00	-3.0%	-90.7%	748.93
Bajaj Auto	9063.15	1.6%	33.3%	741.31	Titan Company	3538.80	-2.9%	-3.7%	601.31
Hindalco Industries	616.15	1.2%	0.2%	615.64	ONGC	275.00	-2.9%	34.1%	956.37
Infosys	1429.50	1.1%	-7.3%	3144.28	Axis Bank	1025.85	-2.5%	-6.9%	1840.82
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bharti Airtel	1265.50	1281.85	-1.3%	2510.48	Asian Paints	2810.00	2776.75	1.2%	489.58
Eicher Motors	4368.00	4444.00	-1.7%	578.76	HUL	2216.95	2172.05	2.1%	754.44
Bajaj Auto	9063.15	9357.95	-3.2%	741.31	ITC	419.75	392.90	6.8%	898.47
Reliance Industries	2925.00	3024.90	-3.3%	2794.15	Kotak Mahindra Bank	1786.95	1667.40	7.2%	764.80
Grasim Industries	2237.95	2323.75	-3.7%	222.82	HDFC Bank	1496.80	1363.55	9.8%	2574.19

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	47.20	4.4%	31.7%	8.37	Kenya Reinsurance Corporation Ltd	1.90	-4.5%	1.1%	0.07
BK Group Plc	35.50	4.4%	-0.8%	0.01	Kenya Power & Lighting Limited	1.50	-2.6%	5.6%	0.45
East African Breweries Limited	158.75	3.4%	39.3%	180.45	The Cooperative Bank of Kenya Ltd	13.50	-2.5%	18.4%	0.62
CIC Insurance Group Ltd	2.38	1.7%	5.3%	0.18	Safaricom Plc	16.35	-2.4%	17.6%	20.90
NCBA Group Plc	45.00	0.8%	15.5%	1.59	Absa Bank Kenya	13.00	-1.5%	13.5%	19.34
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	195.00	200.00	-2.5%	4.13	British American Tobacco Kenya Ltd	412.75	400.00	3.2%	3.43
BK Group Plc	35.50	37.00	-4.1%	0.01	Centum Investment Company Plc	8.00	7.60	5.3%	0.50
CIC Insurance Group Ltd	2.38	2.53	-5.9%	0.18	Kenya Power & Lighting Limited	1.50	1.30	15.4%	0.45
Nation Media Group	20.60	22.40	-8.0%	0.10	Kenya Reinsurance Corporation Ltd	1.90	1.50	26.7%	0.07
Absa Bank Kenya	13.00	14.30	-9.1%	19.34	Total Kenya Ltd	18.50	14.55	27.1%	0.004

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Amiantit Co.	30.80	7.7%	-48.8%	293.13	Alkhaleej Training and Education Co.	33.25	-5.3%	29.4%	36.27
Allianz Saudi Fransi Cooperative Insurance Co.	20.16	6.8%	16.5%	12.82	National Medical Care Co.	191.20	-4.2%	9.6%	24.42
United Cooperative Assurance Co.	11.16	5.7%	27.7%	21.85	Saudi Ceramic Co.	35.60	-3.9%	29.2%	100.89
Takween Advanced Industries Co.	14.16	5.5%	-7.3%	57.43	Sustained Infrastructure Hldg Co.	38.40	-3.2%	26.9%	31.98
Saudi Pharmaceutical Ind. and Medical Appliances Corp.	37.70	4.9%	-0.3%	46.99	Bawan Co.	48.30	-3.0%	5.9%	5.73
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)
Sustained Infrastructure Holding Co.	38.40	38.40	0.0%	31.98	Abdullah Al Othaim Markets Co.	12.26	12.26	0.0%	25.89
MBC Group Co.	57.00	57.00	0.0%	29.67	Abdulmohsen Alhokair Group for Tourism and Dev.	2.67	2.67	0.0%	8.75
LIVA Insurance Co.	18.80	18.80	0.0%	5.82	Al Kathiri Holding Co.	2.88	2.88	0.0%	14.33
SAL Saudi Logistics Svs. Co.	261.60	261.60	0.0%	131.28	Allied Cooperative Insurance Group	18.60	18.60	0.0%	5.88
Lumi Rental Co.	89.60	89.60	0.0%	31.00	Anaam International Holding Group	1.07	1.07	0.0%	21.58

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Holdings Ltd	23348.00	2.8%	-0.4%	58370.00	AngloGold Ashanti Ltd	45000.00	-2.4%	0.8%	90900.00
MTN Group Ltd	8200.00	1.9%	-3.9%	129068.00	Impala Platinum Holdings Ltd	9742.00	-2.3%	22.9%	51145.50
Capitec Bank Holdings Ltd	201710.00	1.8%	-2.9%	86331.88	Aspen Pharmacare Holdings Ltd	21920.00	-2.2%	5.4%	32880.00
Clicks Group Ltd	28250.00	1.6%	-16.4%	17063.00	Anglo American Platinum Ltd	78269.00	-2.1%	2.2%	21602.24
Growthpoint Properties Ltd	1045.00	1.6%	-6.3%	11003.85	Cie Financiere Richemont SA	269845.00	-1.6%	-10.5%	60715.13
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)
Gold Fields Ltd	33912.00	33912.00	0.0%	63754.56	Absa Group Ltd	13877.00	13877.00	0.0%	37051.59
Aspen Pharmacare Holdings Ltd	21920.00	21920.00	0.0%	32880.00	Discovery Ltd	10935.00	10935.00	0.0%	21870.00
Glencore PLC	11238.00	11524.00	-2.5%	30792.12	MTN Group Ltd	8200.00	8200.00	0.0%	129068.00
NEPI Rockcastle NV	12724.00	13301.00	-4.3%	20231.16	Old Mutual Ltd	1008.00	1008.00	0.0%	18023.04
Capitec Bank Holdings Ltd	201710.00	212000.00	-4.9%	86331.88	Remgro Ltd	11801.00	11801.00	0.0%	24546.08

Vietnam*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	66800.00	1.1%	-0.3%	485508.22	Vietnam Rubber Group	28650.00	-5.6%	35.1%	138881.61
PetroVietnam Power Corp	10950.00	0.5%	-2.7%	71801.98	Viet Nam Int. Commercial JS Bank	21500.00	-4.7%	9.7%	165137.50
Vinamilk	64200.00	0.3%	-5.0%	296547.31	Bank for Inv. and Devp	48100.00	-4.4%	10.8%	97547.70
Southeast Asia Commercial JS Bank	22200.00	0.2%	-7.1%	47925.45	Saigon-Hanoi Commercial Bank	11100.00	-3.5%	2.8%	366214.60
					Tien Phong Commercial JS Bank	17000.00	-3.4%	-2.3%	106738.02
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	111800.00	111800.00	0.0%	218044.83	Investment & Industrial Dev. JS Corp.	54300.00	54300.00	0.0%	28899.14
Bank for Inv. and Devp	48100.00	49950.00	-3.7%	97547.70	BaoViet Holdings	38600.00	38600.00	0.0%	30441.96
Vietcombank	90500.00	96000.00	-5.7%	131614.70	Petrovietnam Gas	75100.00	75100.00	0.0%	49192.12
Asia Commercial JS Bank	26750.00	29080.00	-8.0%	282486.07	Mobile World Inv. Corp	49400.00	49400.00	0.0%	343776.79
Vietnam JSC Bank	32700.00	38200.00	-14.4%	634526.59	Saigon Beer Alcohol Beverage Corp.	54000.00	54000.00	0.0%	19800.67

*Market closed on 18/4

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