

BRVM Market Summary

Yesterday, the BRVM (ICXCOMP) closed on a negative note following share price depreciation in ORAC (-2.00%) and SGBC (-1.71%). As a result, the BRVM Composite Index (ICXCOMP) declined by 0.72% to close at 318.59 points. YTD returns settled at 15.42%, while market capitalisation closed at N12.28tn. Activity level in the market declined with the total value and volume of stocks traded declining by 20.35% and 14.11% to settle at XOF928.09mn and 0.82mn units, respectively.

Corporate Actions

- Sitab Côte D'ivoire: Draft resolutions to the Ordinary General Assembly
- Sonatel Senegal: Press release - Appointment to the management.
- National Lottery Of Benin: Draft resolutions to the Combined General Meeting

Top Five Gainers

The top Five (5) gainers out of Seventeen (17) stocks that appreciated in the market yesterday

Symbol	Opening Price (XOF)	Closing Price (XOF)	Change (%)
SICC	3,675.00	3,935.00	7.07%
BNBC	1,780.00	1,890.00	6.18%
UNXC	725.00	760.00	4.83%
TTLS	2,500.00	2,590.00	3.60%
SPHC	6,790.00	6,945.00	2.28%

Top Five Losers

The top Five (5) losers out of Twenty (20) stocks that depreciated in the market yesterday

Symbol	Opening Price (XOF)	Closing Price (XOF)	Change (%)
NEIC	620.00	600.00	(3.23%)
PALC	9,090.00	8,850.00	(2.64%)
ORG	1,750.00	1,710.00	(2.29%)
ORAC	15,000.00	14,700.00	(2.00%)
SGBC	26,000.00	25,555.00	(1.71%)

BRVM Performance Indicators

The market was bearish with the BRVM-CI declining by 0.72% to close at 318.59 Points

Headline	Value	1 Day	YTD
BRVM CI	318.59	(0.72%)	15.42%
Mkt Cap (XOF'bn)	12,283.69	(0.72%)	20.82%
Mkt Cap (\$'mn)	21,680.33	(0.90%)	35.81%
Value (XOF'mn)	928,086,472.00	(20.35%)	N/A
Value (\$'mn)	1,638,043.82	(20.49%)	
Vol (Units' mn)	818,976.00	(14.11%)	
Mkt Breadth	0.9x		N/A

Top Five Traded Volume

ETIT recorded the highest traded volume

Symbol	Closing Price (XOF)	Daily Volume
ETIT	17.00	651,367.00
TTLC	2,540.00	27,591.00
UNXC	760.00	13,836.00
FTSC	4,885.00	11,617.00
ONTBF	2,345.00	9,403.00

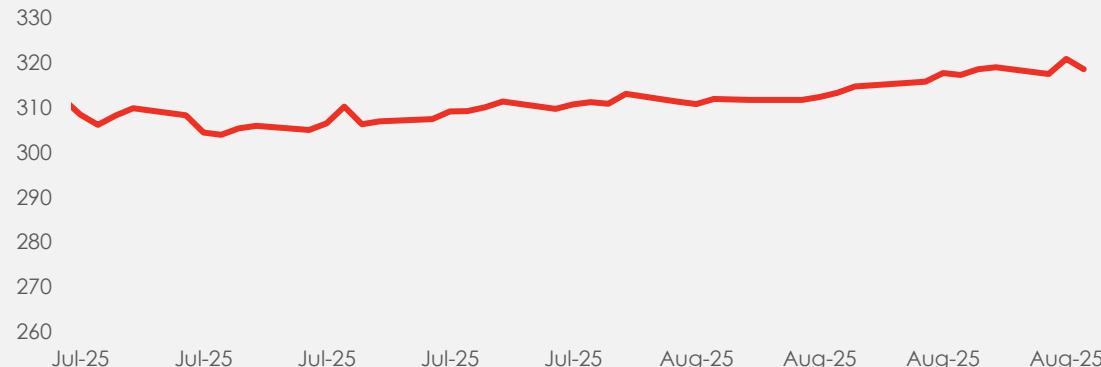
Top Five Traded Value

SNTS recorded the highest traded value

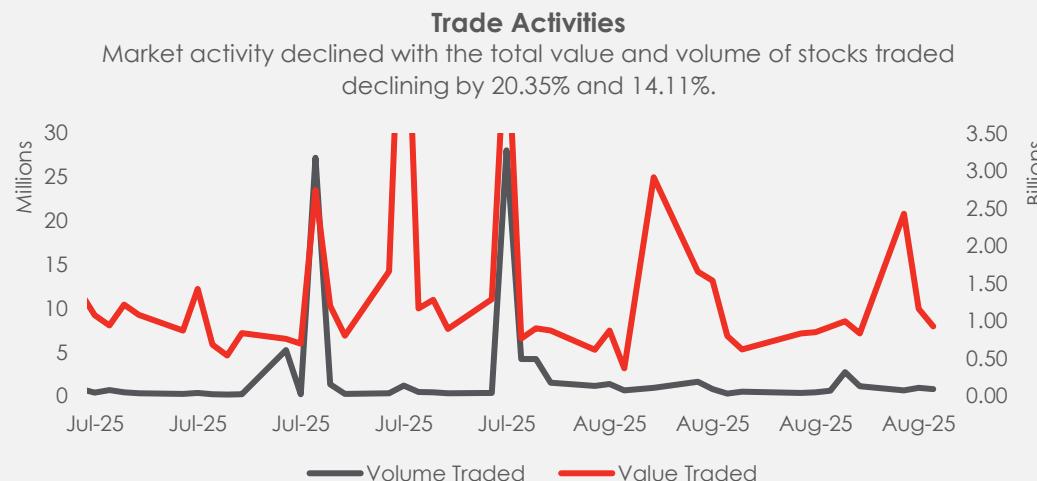
Symbol	Closing Price (XOF)	Daily Value
SNTS	25,000.00	101,715,585.00
STBC	19,600.00	68,775,865.00
TTLC	2,540.00	67,391,745.00
BICC	15,600.00	58,033,530.00
FTSC	4,885.00	56,601,855.00

BRVM-CI Performance Indicators

BRVM Composite Index (ICXCOMP)
ICXCOMP down by 0.72% to close at 318.59

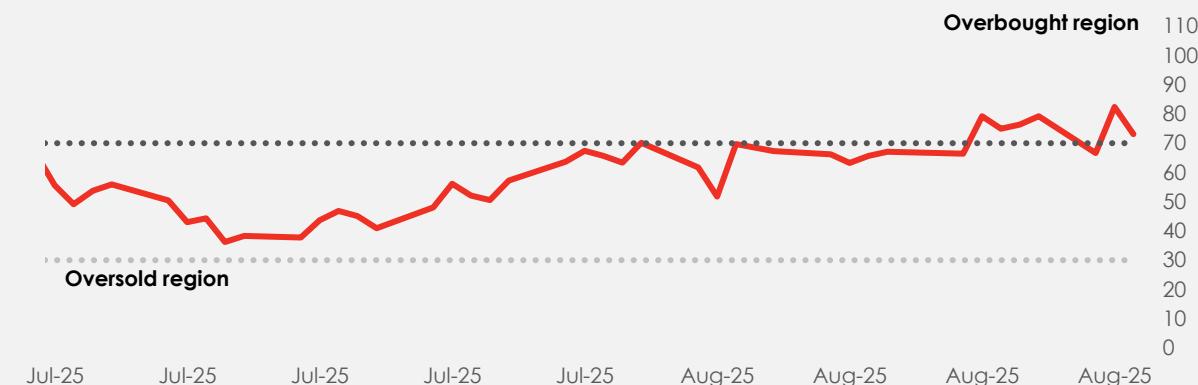


Trading Activity



Relative Strength Index (RSI)

Technical Indicator of Market Position: Relative Strength Index (RSI)
The RSI fell just above the Overbought region by 11.30% to settle at 73.10



Sector Performance

On a sectorial level, performance was bearish as Four (4) out of the Six (6) sectors under our coverage closed in the red zone.

Sectors	1 Day Change	Month-to-date Change	Year-to-Date Change
Other Sector	(0.34%)	(3.00%)	(1.70%)
Agriculture	0.34%	4.44%	67.60%
Distribution	0.69%	3.56%	12.10%
Finance	(0.26%)	2.19%	22.46%
Industry	(1.84%)	1.21%	125.43%
Transport	(6.67%)	(2.78%)	4.29%

Global Equities Market

US stock index futures traded in a stable manner on Wednesday, with investors wary ahead of the release of key earnings from AI bellwether Nvidia.

Index	Current	% Δ DoD	% Δ WTD	% Δ YTD
S&P 500	6,468.00	0.00%	0.00%	10.00%
Dow Jones	45,516.50	0.20%	(0.30%)	7.00%
Nasdaq	21,521.00	(0.10%)	0.10%	11.40%
FTSE 100	9,260.60	(0.10%)	(0.70%)	13.30%
NIKKEI	42,520.30	0.30%	(0.30%)	6.60%

Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bearish as Five (5) Indices fell.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	319.20	(0.50%)	15.70%	n.a.	6.70%
Egypt	35,676.20	0.90%	20.00%	8.10	2.40%
Ghana	7,337.00	0.00%	50.10%	7.40	2.80%
Kenya	171.60	(0.50%)	38.90%	7.40	6.40%
Mauritius	2,444.30	(0.30%)	1.70%	6.60	4.80%
Morocco	46630.00%	0.50%	34.20%	n.a	2.20%
MSCI FM	70000.00%	0.60%	31.40%	n.a	3.50%
South Africa	101,848.50	(0.60%)	21.10%	14.90	3.30%
Tunisia	11,924.40	0.50%	19.80%	26.90	1.90%
Zimbabwe	46,278,420.00	0.00%	(4.90%)	na	6.20%
Nigeria (NGX)	141,248.76	(0.36%)	37.23%	7.43	3.00%

Global Fixed Income Market

We observed muted sentiments in the Global Fixed Income Market.

Index	Current	% Δ DoD	% Δ WTD
US-10Y	4.3	0.20%	0.20%
UK-10Y	4.7	0.00%	0.40%
JP-10Y	1.6	0.00%	0.00%
DE-10Y	2.7	0.00%	0.00%

Global Currency Market

The US Dollar recorded mixed performances against other major global currencies.

Currencies	Current	% Δ DoD	% Δ WTD	% Δ YTD
GBP/USD	1.3	(0.20%)	(0.50%)	7.50%
EUR/USD	1.2	(0.30%)	(1.00%)	12.10%
JPY/USD	0.0	0.40%	0.70%	(5.80%)
CNY/USD	0.1	0.10%	-0.10%	(1.90%)

Key:

YTD – Year to Date change