

1. Equities Market Performance

The Domestic Equity market recorded a surge in performance this week as Turnover and Volume increased. The market recorded a weekly Turnover of approximately TZS 12.95/= billion against a Volume of 10.52 million shares.

Total market capitalization decreased to TZS 19,231.68/= billion, a 1.92% decrease, and the Domestic market capitalization decreased to TZS 12,847.68/= billion, a 2.41% decrease from last week.

Domestic Equities

MKCB was the top-gaining counter this week, closing at TZS 1,010/=, 7.45% up. It was followed by NICO, closing at TZS 960/=, 5.49% up, and TOL closing at TZS 750/=, 2.74% up.

VODA was the top-losing counter this week, closing at TZS 520/=, 20.00% down, followed by DSE, closing at TZS 2,800/=, 13.58% down.

All Shares Index (DSEI) decreased by 1.92% to close at 2,305.06 points as EABL, JHL, and KCB depreciated, and the Tanzania Shares Index (TSI) decreased by 2.41% to close at 4,853.18 points. Banks, Finance & Investment (BI) closed at 7,003.40 points, 0.38% up as MKCB, MBP and NICO appreciated. Industrial and allied (IA) closed at 5,196.43 points, 0.81% up as TPCC declined, and Commercial Services (CS) closed at 1,514.17 points, 18.50% down as VODA declined.

Weekly Remarks

The increase in Turnover and Volume this week was driven by heightened block trading activity, which significantly boosted market liquidity and participation.

We expect this momentum to carry into next week, particularly among financial counters.

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRISE	340	345	+1.47%
CRDB	795	790	-0.63%
DCB	140	135	-3.57%
DSE	3,240	2,800	-13.58%
JATU	265	265	0.00%
MBP	480	490	+2.80%
MCB	280	280	0.00%
MKCB	910	1,010	+7.45%
MUCOBA	400	400	0.00%
NICO	910	960	+5.49%
NMB	6,470	6,550	+1.24%
PAL	360	360	0.00%
SWALA	450	450	0.00%
SWIS	1,540	1,520	-1.30%
TBL	10,900	10,900	0.00%
TCC	17,000	17,000	0.00%
TCCL	1,800	1,820	-1.11%
TOL	670	730	+8.96%
TPCC	4,800	4,700	0.00%
TTP	120	120	0.00%
VODA	770	650	-15.58%
YETU	510	510	0.00%

Source: DSE, Kadoo Calculations



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2. Fixed Income

Primary market

We anticipate the upcoming 20-year Treasury Bond Auction results to oversubscribe.

Secondary market

The secondary bond market recorded 204 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 252.83 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
07 years (10.08%)	48.1745	95.49%
10 years (11.44%)	49.6376	88.80%
10 years (14.00%)	0.0458	101.94%
15 years (11.15%)	0.0429	85.81%
15 years (13.50%)	0.2228	95.04%
20 years (12.10%)	0.0711	88.44%
20 years (15.49%)	52.8537	109.85%
20 years (15.25%)	1.1260	102.65%
25 years (15.75%)	58.7906	111.06%
25 years (15.95%)	10.3110	108.72%

Source: DSE, Kadoo Calculations

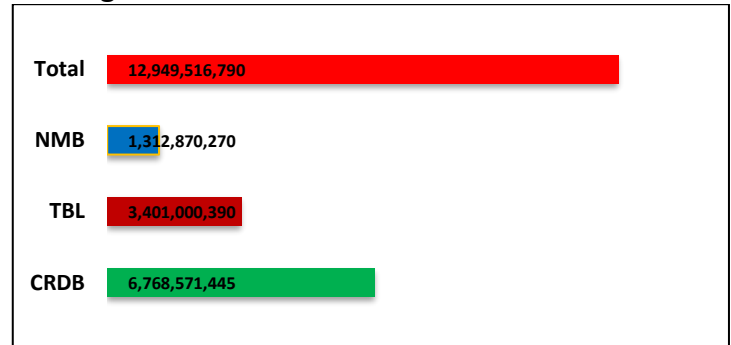
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
07 years (10.08%)	5	92.67%	97.82%
10 years (11.44%)	3	84.90%	93.33%
10 years (14.00%)	2	100.00%	103.89%
15 years (11.15%)	1	85.81%	85.81%
15 years (13.50%)	3	89.13%	100.00%
20 years (12.10%)	2	86.87%	90.00%
20 years (15.49%)	24	89.13%	118.25%
20 years (15.25%)	5	100.00%	107.37%
25 years (15.75%)	112	88.00%	118.53%
25 years (15.95%)	15	103.26%	108.72%

Source: DSE, Kadoo Calculations

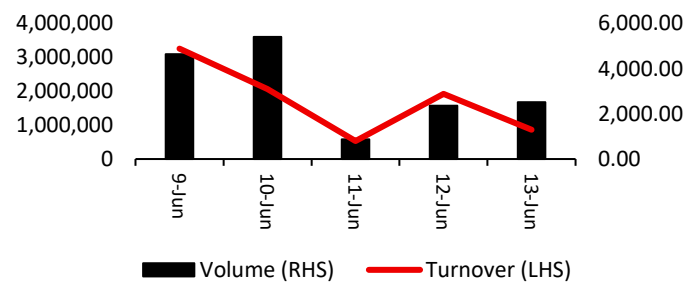
Charts of the week

Leading Turnover



Source: DSE

Turnover Vs Volume



Source: DSE, Kadoo Calculation

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