

WEEKLY MARKET CATCHUP

16th May 2025

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 4.39/= billion against a Volume of 4.67 million shares.

Total market capitalization increased to TZS 19,834.66/= billion, a 2.74% increase, and the Domestic market capitalization increased to TZS 13,281.18/= billion, a 0.20% increase from last week.

Domestic Equities

DSE was the top-gaining counter this week, closing at TZS 2,800/=, 12.90% up. It was followed by AFRIPRICE, closing at TZS 295/=, 11.32% up, and MBP, closing at TZS 440/=, 10.00% up.

There was no losing counter this week.

NMB was a top market mover this week, recording 29.79% of total market turnover, followed by CRDB with 23.26% and TCC with 22.62%.

All Shares Index (DSEI) increased by 2.74% to close at 2,375.06 points as EABL, NMG and JHL appreciated, and the Tanzania Shares Index (TSI) increased by 0.20% to close at 5,009.86 points. Banks, Finance & Investment (BI) closed at 6,624.15 points, 0.30% up as AFRIPRICE, DSE and MBP appreciated. Industrial and allied (IA) closed at 5,351.26 points, 0.15% up as TPCC appreciated, and Commercial Services (CS) closed at 2,156.16 points, 0.08% up as SWIS saw an uptick.

Weekly Remarks

The increase in Turnover and Volume came on the back of an increase in local buyer activity, whose sentiment favored Financial and Industrial counters.

We expect a further increase in Turnover, Volume and Counter prices, especially from Financial and Industrial counters.

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRICE	265	295	+11.92%
CRDB	790	790	0.00%
DCB	115	125	+8.70%
DSE	2,480	2,800	+12.90%
JATU	265	265	0.00%
MBP	400	440	+10.00%
MCB	310	310	0.00%
MKCB	550	590	+7.27%
MUCOBA	400	400	0.00%
NICO	720	790	+9.72%
NMB	6,000	6,000	0.00%
PAL	400	400	0.00%
SWALA	450	450	0.00%
SWIS	1,480	1,520	+2.70%
TBL	10,900	10,900	0.00%
TCC	17,000	17,000	0.00%
TCCL	1,760	1,760	0.00%
TOL	670	670	0.00%
TPCC	5,500	5,550	+0.91%
TTP	120	120	0.00%
VODA	770	770	0.00%
YETU	510	510	0.00%

Source: DSE, Kadoo Calculations



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2. Fixed Income

Primary market

We expect the upcoming 5-year Treasury Bond Auction results to undersubscribe.

Secondary market

The secondary bond market recorded 236 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 142.72 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
15 years (13.50%)	0.0189	103.40%
15 years (14.50%)	0.2067	102.45%
20 years (15.49%)	2.0123	104.84%
20 years (15.25%)	45.1697	107.82%
20 years (12.10%)	0.0041	81.00%
25 years (12.56%)	0.0757	86.75%
25 years (15.75%)	19.8919	107.26%
25 years (15.95%)	74.6257	106.98%

Source: DSE, Kadoo Calculations

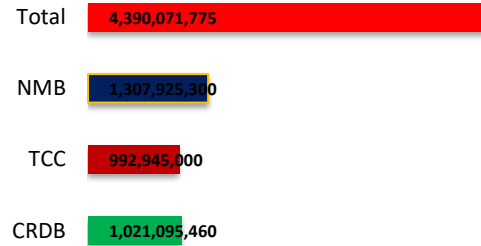
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
15 years (13.50%)	4	102.80%	105.20%
15 years (14.50%)	1	102.45%	102.45%
20 years (15.49%)	17	100.00%	111.71%
20 years (15.25%)	36	100.00%	110.50%
20 years (12.10%)	3	81.00%	81.00%
25 years (12.56%)	4	81.00%	100.00%
25 years (15.75%)	124	99.73%	115.14%
25 years (15.95%)	38	100.00%	113.25%

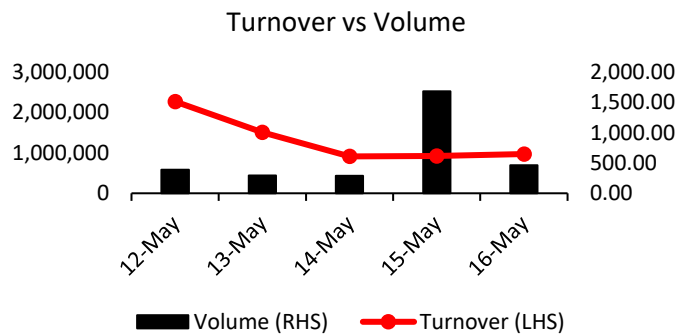
Source: DSE, Kadoo Calculations

Charts of the week

Leading Turnover



Source: DSE



Source: DSE, Kadoo Calculation

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