WEEKLY MARKET CATCHUP 20th June 2025

1. Equities Market Performance

The Domestic Equity market recorded a mixed performance this week as Turnover and Volume increased, but counter prices declined. The market recorded a weekly Turnover of approximately TZS 31.27/= billion against a Volume of 38.75 million shares.

Total market capitalization increased to TZS 19,327.41/= billion, a 0.50% increase, while the Domestic market capitalization decreased to TZS 12,740.41/= billion, a 0.83% decrease from last week.

Domestic Equities

MKCB was the top-gaining counter this week, closing at TZS 1,040/=, 2.97% up. It was followed by TPCC, closing at TZS 4,750/=, 1.06% up, and NMB closing at TZS 6,600/=, 0.76% up.

MCB was the top-losing counter this week, closing at TZS 250/=, 10.71% down, followed by TCCL, closing at TZS 1,750/=, 5.91% down, and VODA closed at TZS 490/=, 5.77% down.

All Shares Index (DSEI) increased by 0.50% to close at 2,316.53 points as EABL, JHL, and KCB appreciated, and the Tanzania Shares Index (TSI) decreased by 0.83% to close at 4,812.66 points. Banks, Finance & Investment (BI) closed at 7,031.26 points, 0.40% up as MKCB appreciated. Industrial and allied (IA) closed at 5,142.15 points, 1.04% down as TCCL and TBL declined, and Commercial Services (CS) closed at 1,433.72 points, 5.31% down as VODA and SWIS declined.

Weekly Remarks

The increased Turnover and Volume this week reflect stronger investor participation, driven by selective interest in Financial and Industrial counters. Despite mixed price movements, overall market liquidity remained healthy.

We expect this momentum to continue into next week, with financial counters likely to maintain dominance.

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRISE	345	345	0.00%
CRDB	790	790	0.00%
DCB	135	135	0.00%
DSE	2,800	2,800	0.00%
JATU	265	265	0.00%
MBP	490	490	0.00%
MCB	280	250	-10.71%
MKCB	1,010	1,040	+2.97%
MUCOBA	400	400	0.00%
NICO	960	910	-4.17%
NMB	6,550	6,600	+0.76%
PAL	360	360	0.00%
SWALA	450	450	0.00%
SWIS	1,550	1,530	-1.29%
TBL	10,900	10,690	-1.93%
TCC	16,660	16,660	0.00%
TCCL	1,860	1,750	-5.91%
TOL	750	720	-4.00%
TPCC	4,700	4,750	+1.06%
TTP	120	120	0.00%
VODA	520	490	-5.77%
YETU	510	510	0.00%

Source: DSE, Kadoo Calculations

2. Fixed Income

Primary market

The 20-year Treasury Bond Auction results were oversubscribed.

Secondary market

The secondary bond market recorded 122 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 147.89 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
10 years (11.44%)	59.8901	91.31%
15 years (14.50%)	0.0100	100.00%
20 years (15.49%)	42.5238	106.86%
20 years (15.25%)	1.0051	106.55%
25 years (12.56%)	0.2596	95.92%
25 years (15.75%)	21.4692	111.19%
25 years (15.95%)	10.7128	109.91%

Source: DSE, Kadoo Calculations

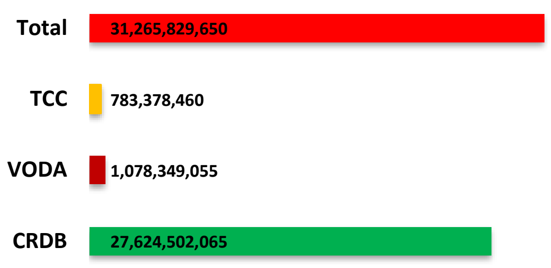
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
10 years (11.44%)	6	84.90%	97.86%
15 years (14.50%)	1	100.00%	100.00%
20 years (15.49%)	42	100.00%	119.24%
20 years (15.25%)	11	100.00%	114.00%
25 years (12.56%)	8	89.85%	100.00%
25 years (15.75%)	25	100.00%	123.60%
25 years (15.95%)	17	100.00%	118.31%

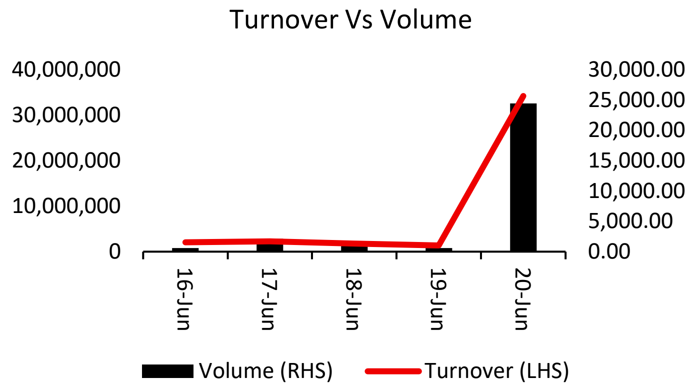
Source: DSE, Kadoo Calculations

Charts of the week

Leading Turnover



Source: DSE



Source: DSE, Kadoo Calculation

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