

**WEEKLY MARKET CATCHUP**

**23<sup>rd</sup> 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 37.99/= billion against a Volume of 8.09 million shares.

Total market capitalization decreased to TZS 19,714.00/= billion, a 0.61% decrease, and the Domestic market capitalization declined to TZS 13,234.22/= billion, a 0.35% decrease from last week.

**Domestic Equities**

MKCB was the top-gaining counter this week, closing at TZS 700/=, 18.64% up. It was followed by DSE, closing at TZS 3,200/=, 14.29% up, and MBP, closing at TZS 480/=, 9.09% up.

TPCC was the top-losing counter this week, closing at TZS 5,200/=, 6.31% down, followed by DCB, closing at TZS 120/=, 4.00% down.

All Shares Index (DSEI) decreased by 0.61% to close at 2,360.69 points as EABL, NMG and KCB depreciated, and the Tanzania Shares Index (TSI) decreased by 0.35% to close at 4,992.14 points. Banks, Finance & Investment (BI) closed at 6,641.43 points, 0.26% up as AFRIPRICE, DSE and MBP and NICO appreciated. Industrial and allied (IA) closed at 5,295.84 points, 1.04% up as TPCC declined, and Commercial Services (CS) closed at 2,158.69 points, 0.12% up as SWIS saw an uptick.

**Weekly Remarks**

The surge in Turnover and Volume came on the back of an increase in investors' sentiment on Industrial counters.

We remain cautious of this momentum as the surge in Turnover and Volume was due to block trades.

**Share Price Performance:**

**Domestic Counters:**

COMPANY	Last Week	This Week	% Change
AFRIPRISE	295	300	+1.69%
CRDB	790	790	0.00%
DCB	125	120	-4.00%
DSE	2,800	3,200	+14.29%
JATU	265	265	0.00%
MBP	440	480	+9.09%
MCB	310	310	0.00%
MKCB	590	700	+18.64%
MUCOBA	400	400	0.00%
NICO	790	800	+1.27%
NMB	6,000	6,000	0.00%
PAL	400	400	0.00%
SWALA	450	450	0.00%
SWIS	1,520	1,580	+3.95%
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	5,550	5,200	-6.31%
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

The 5-year Treasury Bond Auction results to oversubscribed.

### Secondary market

The secondary bond market recorded 134 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 70.43 Bln.

### Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
10 years (10.25%)	0.0017	78.79%
10 years (11.44%)	0.0009	78.79%
10 years (14.00%)	0.2074	103.70%
15 years (11.15%)	0.0009	78.79%
20 years (15.49%)	8.8564	105.08%
20 years (15.25%)	37.4648	109.45%
20 years (12.10%)	0.0025	78.79%
25 years (12.56%)	0.0116	83.77%
25 years (15.75%)	8.3900	108.19%
25 years (15.95%)	15.1842	107.42%

Source: DSE, Kadoo Calculations

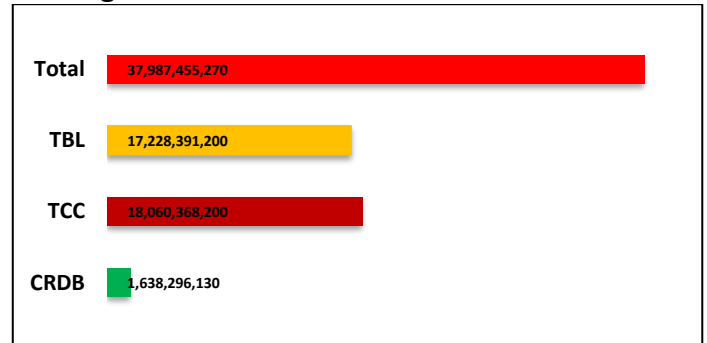
### Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
10 years (10.25%)	2	78.79%	78.79%
10 years (11.44%)	1	78.79%	78.79%
10 years (14.00%)	2	102.40%	105.00%
15 years (11.15%)	1	78.79%	78.79%
20 years (15.49%)	22	100.00%	110.15%
20 years (15.25%)	12	106.44%	115.14%
20 years (12.10%)	3	78.79%	78.79%
25 years (12.56%)	2	78.79%	88.76%
25 years (15.75%)	56	100.00%	113.64%
25 years (15.95%)	18	100.00%	112.09%

Source: DSE, Kadoo Calculations

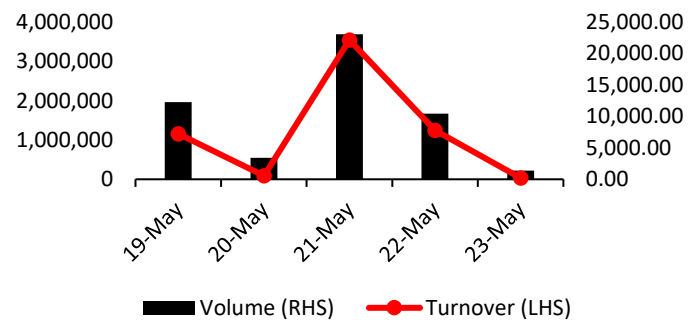
## Charts of the week

### Leading Turnover



Source: DSE

### Turnover Vs Volume



Source: DSE, Kadoo Calculation

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