

WEEKLY MARKET CATCHUP

25th April 2025

1. Equities Market Performance

The Domestic Equity market showed a decrease in performance this week as both Turnover and Volume declined. The market recorded a weekly Turnover of approximately TZS 3.6/= billion against a Volume of 4.45 million shares.

Total market capitalization increased to TZS 18,923.42/= billion, a 0.1% increase, while the Domestic market capitalization decreased to TZS 12,974.04/= billion, a 0.08% decline from last week.

Domestic Equities

AFRIPRICE was the top-gaining counter this week, closing at TZS 245/=, 4.26% up and MBP closing at TZS 395/=, 2.60% up

MKCB was the top losing counter this week, closing at TZS 550/=, 5.17% down, followed by NICO closing at TZS 690/=, 4.17% down, and TCCL closing at TZS 1,760/=, 2.22% down.

CRDB was a top market mover this week, recording 94.46% of total market turnover, followed by TPCC with 1.69% and NMB with 1.64%.

All Shares Index (DSEI) Increased by 0.1% to close at 2,265.95 points as JHL and KCB appreciated, while the Tanzania Shares Index (TSI) decreased by 0.08% to close at 4,894.02 points. Banks, Finance & Investment (BI) closed at 6,589.80 points, 0.02% down as MKCB and NICO saw a decline. Industrial and allied (IA) closed at 5,115.38 points, 0.17% down as TCCL and TPCC depreciated, and Commercial Services (CS) closed at 2,142.69, the same as last week.

Weekly Remarks

Surprisingly, despite ongoing dividend announcements and the release of 2024 Audited Annual Financial Statements, this was not enough to increase market Turnover and Volume. We think investors are still observing market trends before making further investment decisions.

We anticipate an increase in Turnover, volume, and Counter activity in the coming week.

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRICE	235	245	+4.26%
CRDB	790	790	0.00%
DCB	125	125	0.00%
DSE	2,340	2,340	0.00%
JATU	265	265	0.00%
MBP	385	395	+2.60%
MCB	310	310	0.00%
MKCB	580	550	-5.17%
MUCOBA	400	400	0.00%
NICO	720	690	-4.17%
NMB	6,000	6,000	0.00%
PAL	400	400	0.00%
SWALA	450	450	0.00%
SWIS	1,200	1,200	0.00%
TBL	10,900	10,900	0.00%
TCC	17,000	17,000	0.00%
TCCL	1,800	1,760	-2.22%
TOL	670	670	0.00%
TPCC	4,100	4,060	-0.98%
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 10-year Treasury Bond Auction results to underperform.

Secondary market

The secondary bond market recorded 88 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 11.986 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
05 years (13.00%)	0.1020	102.05%
10 years (11.44%)	0.0100	93.46%
15 years (13.50%)	4.2887	101.00%
15 years (11.15%)	0.0010	90.00%
20 years (15.49%)	1.5147	104.15%
20 years (15.25%)	4.1957	106.55%
25 years (12.56%)	0.3815	88.80%
25 years (15.75%)	0.0250	100.00%
25 years (15.95%)	1.0493	104.90%

Source: DSE, Kadoo Calculations

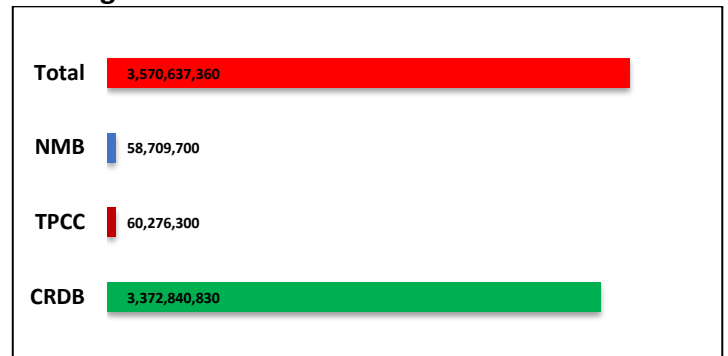
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
05 years (13.00%)	1	102.05%	102.05%
10 years (11.44%)	1	93.46%	93.46%
15 years (13.50%)	3	91.08%	105.97%
15 years (11.15%)	1	90.00%	90.00%
20 years (15.49%)	13	100.00%	113.98%
20 years (15.25%)	29	100.00%	125.00%
25 years (12.56%)	14	82.25%	100.00%
25 years (15.75%)	1	100.00%	100.00%
25 years (15.95%)	19	100.00%	108.50%

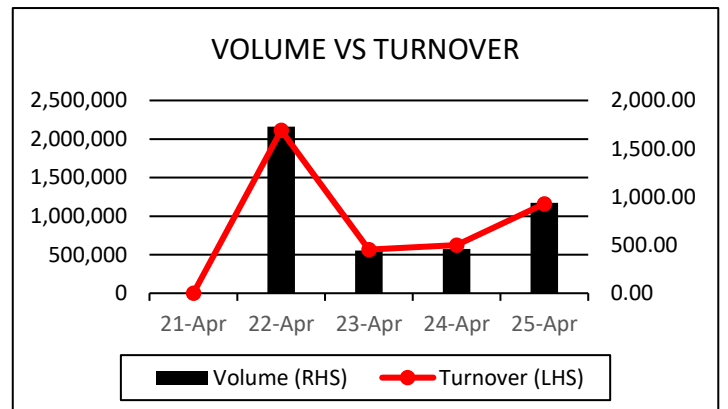
Source: DSE, Kadoo Calculations

Charts of the week

Leading Turnover



Source: DSE



Source: DSE, Kadoo Calculation

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