

WEEKLY MARKET CATCHUP

30th May 2025

1. Equities Market Performance

The Domestic Equity market recorded a decline in performance this week as Turnover and Volume decreased. The market recorded a weekly Turnover of approximately TZS 2.7 billion against a Volume of 3.02 million shares.

Total market capitalization decreased to TZS 19,711.85/= billion, a 0.01% decrease, and the Domestic market capitalization increased to TZS 13,250.85/= billion, a 0.13% increase from last week.

Domestic Equities

MKCB was the top-gaining counter this week, closing at TZS 790/=, 12.86% up. It was followed by DCB, closing at TZS 135/=, 12.50% up, and NMB closing at TZS 6,300/=, 5.00% up.

TPCC was the top-losing counter this week, closing at TZS 4,400/=, 15.38% down, followed by SWIS, closing at TZS 1,540/=, 2.53% down.

All Shares Index (DSEI) decreased by 0.03% to close at 2,359.91 points as EABL and NMG depreciated, and the Tanzania Shares Index (TSI) increased by 0.10% to close at 4,996.99 points. Banks, Finance & Investment (BI) closed at 6,835.69 points, 2.92% up as MKCB, DSE, DCB, and NICO appreciated. Industrial and allied (IA) closed at 5,171.43 points, 2.35% down as TPCC declined, and Commercial Services (CS) closed at 2,157.01 points, 0.08% down as SWIS declined.

Weekly Remarks

This week's decline in Turnover and Volume reflects a market cooldown following a reduced impact of block trades.

However, we anticipate a rebound in both Turnover and Volume in the coming week.

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRISE	300	310	+3.33%
CRDB	790	790	0.00%
DCB	120	135	+12.50%
DSE	3,200	3,240	+1.25%
JATU	265	265	0.00%
MBP	480	455	-5.21%
MCB	310	290	-6.45%
MKCB	700	790	+12.86%
MUCOBA	400	400	0.00%
NICO	800	810	+1.25%
NMB	6,000	6,300	+5.00%
PAL	400	400	0.00%
SWALA	450	450	0.00%
SWIS	1,580	1,540	-2.53%
TBL	10,900	10,900	0.00%
TCC	17,000	17,000	0.00%
TCCL	1,760	1,800	+2.27%
TOL	670	670	0.00%
TPCC	5,200	4,400	-15.38%
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 25-year Treasury Bond Auction results to oversubscribe.

Secondary market

The secondary bond market recorded 107 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 131.41 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
05 years (13.00%)	28.8533	103.33%
10 years (14.00%)	0.6610	100.00%
15 years (13.50%)	24.7642	107.97%
20 years (15.49%)	21.9309	105.38%
20 years (15.25%)	31.6532	109.70%
25 years (15.75%)	2.1759	108.72%
25 years (15.95%)	19.7045	108.44%

Source: DSE, Kadoo Calculations

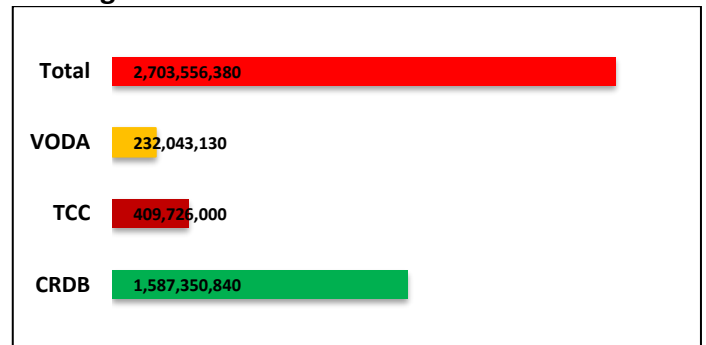
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
05 years (13.00%)	4	102.40%	104.00%
10 years (14.00%)	1	100.00%	100.00%
15 years (13.50%)	7	101.85%	112.25%
20 years (15.49%)	37	100.00%	110.80%
20 years (15.25%)	5	103.88%	113.60%
25 years (15.75%)	17	100.00%	113.58%
25 years (15.95%)	12	100.00%	108.44%

Source: DSE, Kadoo Calculations

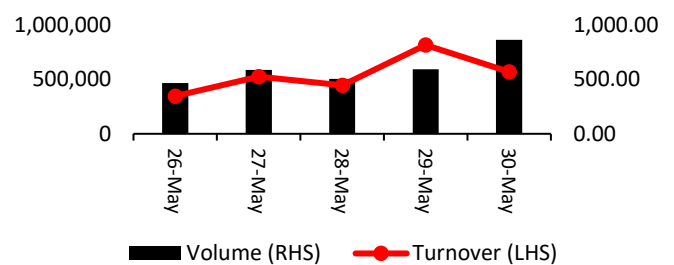
Charts of the week

Leading Turnover



Source: DSE

Turnover Vs Volume



Source: DSE, Kadoo Calculation

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