WEEKLY MARKET CATCHUP 9th May 2025

1. Equities Market Performance

The Domestic Equity market recorded a subpar performance this week as Turnover and Volume declined. The market recorded a weekly Turnover of approximately TZS 3.955/= billion against a Volume of 3.18 million shares.

Total market capitalization increased to TZS 19,306.13/= billion, a 0.74% increase, and the Domestic market capitalization increased to TZS 13,254.97/= billion, a 0.89% increase from last week.

Domestic Equities

TPCC was the top-gaining counter this week, closing at TZS 5,500/=, 22.22% up. It was followed by SWIS, closing at TZS 1,480/=, 13.85% up, and NICO, closing at TZS 790/=, 9.72% up.

CRDB was the losing counter, closing at TZS 790/=, 3.66% down.

CRDB was a top market mover this week, recording 49.52% of total market turnover, followed by TCC with 19.49% and TPCC with 15.93%.

All Shares Index (DSEI) increased by 0.74% to close at 2,311.78 points as EABL and JHL appreciated, and the Tanzania Shares Index (TSI) increased by 0.89% to close at 4,999.98 points. Banks, Finance & Investment (BI) closed at 6,604.47 points, 1.29% down as CRDB depreciated. Industrial and allied (IA) closed at 5,343.43 points, 3.05% up as TPCC appreciated, and Commercial Services (CS) closed at 2,154.48 points, 0.35% up as SWIS saw a price increase.

Weekly Remarks

The decline in turnover and volume reflects cautious sentiment, partly driven by CRDB trading ex-dividend, which led to a price drop as the ex-dividend effect took hold.

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

Share Price Performance:

Domestic Counters:

COMPANY	Last Week	This Week	% Change
AFRIPRISE	255	265	+3.92%
CRDB	820	790	-3.66%
DCB	115	115	0.00%
DSE	2,340	2,480	+5.98%
JATU	265	265	0.00%
MBP	395	400	+1.27%
MCB	310	310	0.00%
MKCB	550	550	0.00%
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	1,300	1,480	+13.85%
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	4,500	5,500	+22.22%
TTP	120	120	0.00%
VODA	770	770	0.00%
YETU	510	510	0.00%

Source: DSE, Kadoo Calculations

2. Fixed Income

Primary market

The 25-year Treasury Bond Auction results were oversubscribed.

Secondary market

The secondary bond market recorded 80 deals from both Treasury and Corporate bond segments this week, recording a total Turnover of TZS 20.68 Bln.

Secondary Market Data

TENURE (Coupon)	Turnover (Bln)	Average Price
10 years (14.00%)	2.1520	103.44%
15 years (13.50%)	4.1746	103.72%
15 years (14.50%)	0.0089	100.22%
20 years (15.49%)	0.6400	103.98%
20 years (15.25%)	3.2901	104.19%
25 years (12.56%)	0.0593	94.10%
25 years (15.75%)	1.5078	108.44%
25 years (15.95%)	1.9910	105.14%

Source: DSE, Kadoo Calculations

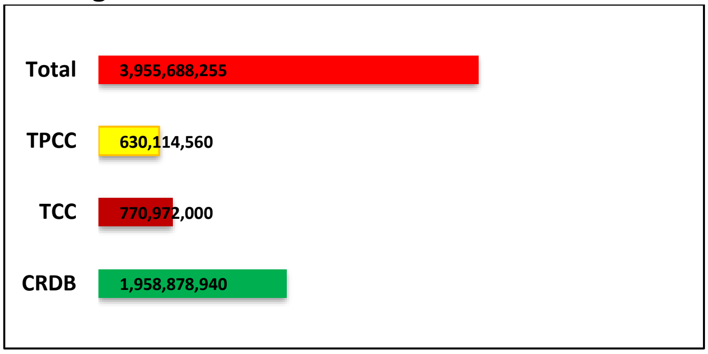
Secondary Market Price Summary

TENURE (Coupon)	Deals	Min. Price	Max. Price
10 years (14.00%)	9	100.00%	104.68%
15 years (13.50%)	1	103.72%	103.72%
15 years (14.50%)	1	100.22%	100.22%
20 years (15.49%)	18	100.00%	110.18%
20 years (15.25%)	6	100.00%	109.96%
25 years (12.56%)	5	85.24%	100.00%
25 years (15.75%)	12	108.02%	110.00%
25 years (15.95%)	24	100.00%	109.50%

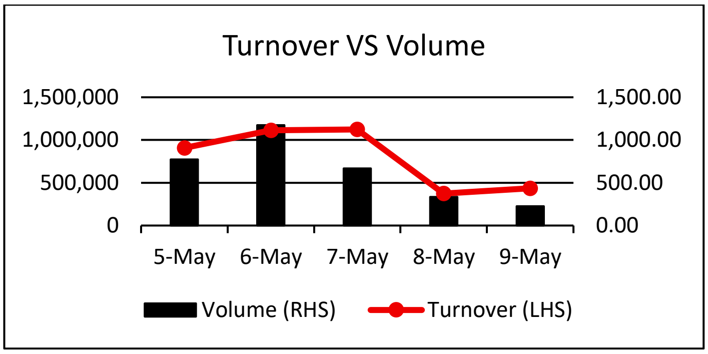
Source: DSE, Kadoo Calculations

Charts of the week

Leading Turnover



Source: DSE



Source: DSE, Kadoo Calculation

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