

# WEEKLY MARKET REPORT



ORBIT SECURITIES

20th - 27th June 2025

## MARKET COMMENTARY

- For the week under review, total market turnover declined significantly to TZS 13.244 billion, representing a 56.32% decrease from the previous week's turnover of TZS 30.326 billion.
- CRDB Bank Plc emerged as the top mover, contributing a trading turnover of TZS 10.529 billion, followed by NMB Bank Plc and VODACOM, with trading turnover of TZS 2.301 billion and TZS 91.516 million, respectively.
- Investor participation remained predominantly local, with domestic investors accounting for 97% of total buy-side activity, while foreign investors represented only 3%. On the sell side, local investors were also more active, dominating market disposals.
- Price movements were mixed across the domestic counters;
  - Gainers- TCCL gained by 15%, MKCB rose by 6% and DSE increases by 4%
  - Losers- PAL dropped by 14% , MCB declined by 4% and SWIS fall by 2%

## EQUITY MARKET STATISTICS

|                        | Previous (TZS) | USD           | Current (TZS)  | USD          | %Change |
|------------------------|----------------|---------------|----------------|--------------|---------|
| Turnover               | 30,326,959,650 | 11,471,008.18 | 13,244,171,845 | 5,022,273.38 | -56.32% |
| Volume                 | 38,195,300     |               | 14,152,553     |              | -62.94% |
| Total Mkt Cap (Trn)    | 19,327.41      | 7.31 Bln      | 19,481.40      | 7.39 Bln     | +0.796% |
| Domestic Mkt Cap (Trn) | 12,740.41      | 4.82 Bln      | 12,795.19      | 4.85 Bln     | +0.429% |

## TOP MOVERS

| Counter | Volume     | Turnover (TZS) | Market Cap (TZS Biln) |
|---------|------------|----------------|-----------------------|
| CRDB    | 13,318,338 | 10,529,810,650 | 2,089.47              |
| NMB     | 348,492    | 2,301,164,130  | 3,340.00              |
| VODA    | 186,109    | 91,516,555     | 1,120.00              |

INDICES

|                                   | Previous | Current  | %change |
|-----------------------------------|----------|----------|---------|
| All Share Index (DSEI)            | 2,316.53 | 2,335.00 | +0.8%   |
| Tanzania Share Index (TSI)        | 4,812.66 | 4,833.35 | +0.4%   |
| Industrial & Allied (AI)          | 5,142.15 | 5,118.59 | -0.5%   |
| Banking Finance & Investment (BI) | 7,031.26 | 7,116.38 | +1.2%   |
| Commercial Service (CS)           | 1,433.72 | 1,449.47 | +1.1%   |

GAINERS

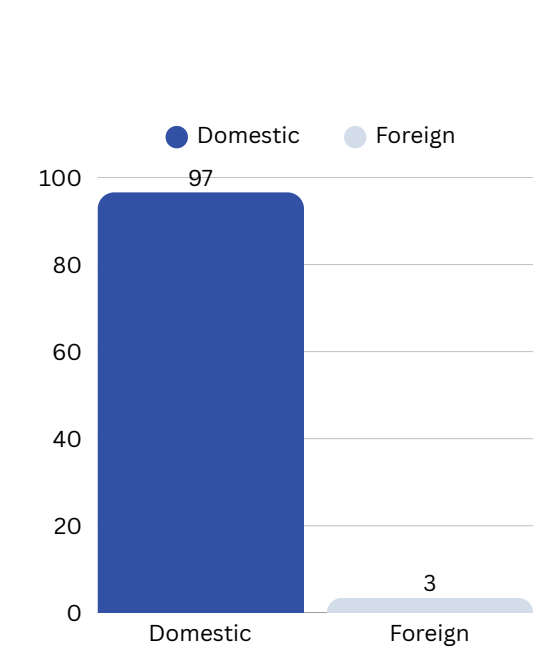
| Counter | Closing Price (TZS) | % Change |
|---------|---------------------|----------|
| TCCL    | 2,020               | +15%     |
| MKCB    | 1,100               | +6%      |
| DSE     | 2,900               | +4%      |

LOSERS

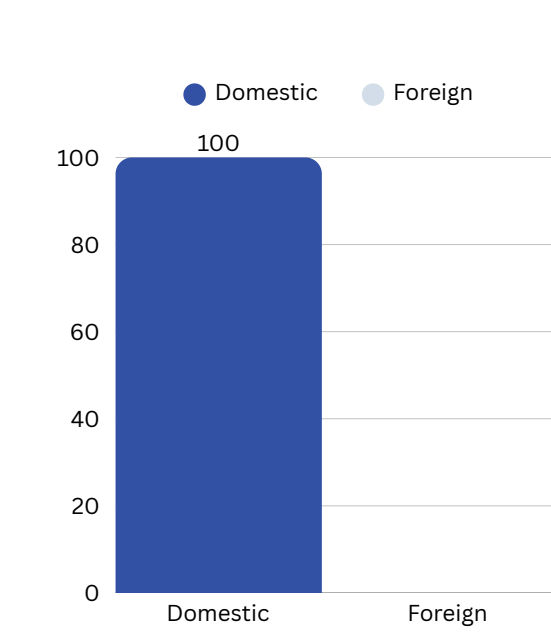
| Counter | Closing Price (TZS) | % Change |
|---------|---------------------|----------|
| PAL     | 310                 | -14%     |
| MCB     | 240                 | -4%      |
| SWISS   | 1,500               | -2%      |

INVESTOR PARTICIPATION

BUYING



SELLING



## DIVIDEND UPDATES FOR THE ACCOUNTING PERIOD (TZS per Share)

| Company   | FY 2020 | FY 2021 | FY 2022 | FY 2023 | FY 2024     | PAYMENT DATES         |
|-----------|---------|---------|---------|---------|-------------|-----------------------|
| CRDB      | 22      | 36      | 45      | 50      | 65          | 2 <sup>nd</sup> June  |
| DSE       | 74      | 101     | 116     | 145     | 125         | 1 <sup>st</sup> July  |
| NICOL     | 10      | 37      | 43      | 53      |             |                       |
| NMB       | 137     | 193     | 286     | 361.18  | 428.85      | 19 <sup>th</sup> June |
| MAENDELEO |         |         | 26      | 44      |             |                       |
| MKCB      | -       | -       | -       | -       | 92.4        | 15 <sup>th</sup> Aug  |
| SWISS     | -       | 30      | 42      | 51.33   | 70          | 2 <sup>nd</sup> June  |
| TBL       | 255     | 290     | -       | 537     | 818*interim | 16 <sup>th</sup> June |
| TCC       | 800     | 670     | 500     | 200     | 850         | 13 <sup>th</sup> May  |
| AFRIPRISE | 6       | 10      | 13      | 13      |             |                       |
| TOL       | 34.78   | 40      | 50      | -       |             |                       |
| TPCC      | 390     | 390     | 390     | 390     | 600         | 30 <sup>th</sup> June |
| VODA      | 12.26   | -       | 9.95    | 11.93   |             |                       |

## GOVERNMENT SECURITIES' YIELDS

| T-Bills   | 35 Days | 91 Days | 182 Days | 364 Days |          |          |          |
|-----------|---------|---------|----------|----------|----------|----------|----------|
| June 2025 | 6.49%   | 7.49%   | 8.14%    | 8.71%    |          |          |          |
| T-Bonds   | 2 Years | 5 Years | 7 Years  | 10 Years | 15 Years | 20 Years | 25 Years |
| June 2025 | 12.08%  | 12.94%  | 9.71%    | 14.25%   | 14.62%   | 14.5%    | 14.79%   |

