

Daily Market Report

15 March 2022

JSE

JSE All-Share fell 2.42% to close at 71,903.75 points on Monday, as Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 214.87 points, down by 0.59% on Monday with Setao Côte d'Ivoire and Bank of Africa - Burkina Faso being the top losers.

NSE

NSE All-Share Index slipped by 0.02% to close at 47,428.67 points on Monday, as Insurance, Consumer Goods and Oil & Gas sector recorded losses.

EGX

EGX 30 Index decreased by 0.58% to close at 10,419.56 points on Monday, as market lost LE 8.3 bn of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index inched up by 0.06% to close at 948.10 points on Monday.

African Markets

Nigeria NSE 30 Index marginally increased by 0.08% and closed at 1,821.71 points on Monday. Ecobank and United Capital were the top gainers.

Egypt: EGX 30 Index decreased by 0.58% to close at 10,419.56 points on Monday, as market lost LE 8.3 bn of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index inched up by 0.08% and closed at 1,866.30 points on Monday. Standard Chartered Bank Kenya and Diamond Trust Bank were the top gainers.

South Africa JSE Top 40 Index fell 2.72% to close at 65,500.56 points on Monday, as Industrial and Resources sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange	▼	2.42%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.59%
NSE Nigerian Stock Exchange	▼	0.02%
EGX Egyptian Stock Exchange	▼	0.58%
ESG Casablanca Stock Exchange	▲	0.06%

Nigeria Key Indicators

	Current
Inflation	15.60%
Exchange Rate	₦416.45
INTERBANK RATES	
OPR	4.67 ▲
Overnight	5.00 ↔

Other Emerging Markets

Abu Dhabi ADX Index declined by 0.97% to close at 9,542.65 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE dropped by 1.49% to close at 506.63 points.

Vietnam: VN-30 Index decreased by 1.09% to close at 1,461.10 points on Monday, as the blue-chip companies recorded losses. MSCI Vietnam declined by 1.34% to close at 971.17 points.

Saudi Arabia: Tadawul All Share Index declined by 0.90% to close at 12,492.14 points on Monday, as losses in the Petrochemicals, Building & Construction and Hotels & Tourism sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.92% to close at 1,765.44 points.

India: Nifty 50 Index rose 1.45% to close at 16,871.30 points on Monday, as gains in the Banking, IT and Technology sectors led shares higher. MSCI India increased by 0.93% to close at 1,957.06 points.

News

Nigeria:

NGX, MTNN sign MoU on capital market participation
Access Bank finalises transition to holdco
FG begins agro-investment scheme for N-Power beneficiaries

Kenya:

Current account gap at three-year high on rising oil prices
IFC to buy Sh4.2bn of mortgage firm's bonds
Safaricom Signs 5-Year Lease Infrastructure Agreement with Ethiopia

Abu Dhabi:

Abu Dhabi's Sanad signs deal with Thales to develop aviation services
Abu Dhabi's Statistics Centre, G42 Cloud partner to use AI solutions
UAE's ecommerce marketplace will hit \$8b in 2025

Saudi Arabia:

Saudi miner Amak's IPO attracts \$1.07bn from retail investors
PIF-owned SRC signs refinancing deal with SNB
Saudi's Alkhabeer Capital kick-starts IPO of Islamic fund

Egypt:

Venture capital investments in Egypt expected to cross \$1bn in 2022
Funding portfolio of Intl. Islamic Trade Finance Corp with Egypt is \$13.8B
Remittances from Egyptians abroad up to \$31.5 billion in 2021: CBE

South Africa:

Absa sees massive leap in full-year profit
Standard announces board changes at Liberty after its 100% acquisition
Improvon partners with Nedbank to develop R1.3bn Dakota Precinct

India:

Retail inflation at 8-month high, double-digit WPI for 11th month
Exports soar by 25% to \$34.57 bn in Feb; trade deficit at \$20.88 bn
IOC buys 3 million barrels Russian Urals crude via tender: Report

Vietnam:

Gov't approves draft resolution on environmental protection tax on petrol
Vietnam seeks US investment in renewable energy
Reference exchange rate up 14 VND at week's beginning

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,542.65	-1.0%	-1.0%	2.4%	12.4%	AED/USD	3.67	0.0%	0.0%
Egypt	10,419.56	-0.6%	-0.3%	-6.5%	-12.5%	EGP/USD	15.71	0.1%	0.0%
India	16,871.30	1.4%	1.4%	0.5%	-2.8%	INR/USD	76.57	0.0%	3.0%
Kenya	1,866.30	0.1%	0.1%	-1.1%	-1.9%	KES/USD	114.25	0.0%	1.0%
Nigeria	1,821.71	0.1%	0.1%	0.1%	5.8%	NGN/USD	415.75	-0.1%	0.5%
Saudi Arabia	12,492.14	-0.9%	-1.5%	-0.8%	10.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	65,500.56	-2.7%	-2.7%	-5.9%	-2.3%	ZAR/USD	15.07	0.4%	-5.6%
Vietnam	1,461.10	-1.1%	-1.1%	-3.7%	-4.9%	VND/USD	22,900.00	0.1%	0.5%

MSCI Emerging Markets

MSCI Frontier	594.33	-0.4%	-0.4%	-3.1%	-10.7%	Brent Crude (\$)	106.90	-5.1%	37.4%
MSCI Frontier 100	1,398.68	-0.3%	-0.3%	-2.8%	-8.8%	Gold (\$)	1,960.80	-1.2%	7.2%
MSCI Emerging	1,055.01	-2.8%	-2.8%	-9.9%	-14.4%	Copper (\$)	9,935.00	-2.4%	2.2%
MSCI World (USD)	2,826.49	-0.5%	-0.5%	-5.1%	-12.5%	Coffee (\$)	194.94	-0.6%	-1.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	11.80	7.3%	41.3%	74.30	International Breweries	5.05	-2.9%	7.4%	51.32
United Capital PLC	12.95	3.2%	30.8%	119.73	P Z Cussons	7.15	-2.7%	17.2%	18.67
FCMB	3.60	2.9%	20.8%	3839.07	Axamansard	2.30	-2.1%	3.1%	0.31
Transnational Corporation	1.13	2.7%	14.1%	23.79	Unilever	13.00	-1.5%	-3.0%	33.52
Lafarge Africa	23.95	1.9%	1.1%	52.30	Guaranty	26.70	-1.1%	2.7%	455.38
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Total	264.90	264.90	0.0%	19.60	Nigerian Breweries	45.50	45.45	0.1%	167.21
Presco	125.00	125.00	0.0%	115.95	Stanbic IBTC	34.50	33.90	1.8%	1.54
Airtel Africa	1260.00	1271.00	-0.9%	8.84	Cap	18.00	17.55	2.6%	0.08
Okomu Oil	140.00	142.00	-1.4%	7.62	Nestle	1435.00	1375.00	4.4%	74.09
UBA	8.70	8.85	-1.7%	117.62	Nascon	13.50	12.90	4.7%	0.17

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ras Al Khaimah Poultry	2.30	15.0%	-1.3%	0.00	Abu Dhabi Commercial Bank	10.52	-3.8%	23.3%	54.94
National Corp for Tourism and Hotels	2.94	14.8%	-2.0%	0.00	Apex Investment P.S.C	5.97	-3.7%	-10.9%	4.66
Easylease motorcycle rentals	45.80	12.9%	57.9%	5.98	Response Plus Holding	8.66	-3.6%	-10.3%	0.94
FERTIGLOBE PLC	5.24	5.9%	48.9%	180.03	First Abu Dhabi Bank	21.78	-1.9%	15.6%	345.18
Sudatel Telecom	0.35	3.2%	0.0%	0.02	PALMS SPORTS	12.58	-1.6%	2.9%	3.33
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Al Buhaira Ntl Ins.	2.00	2.00	0.0%	0.00	Fujairah Cement Industries	0.47	0.47	0.4%	0.00
Insurance House	0.89	0.89	0.0%	0.00	Agthia Group	4.56	4.50	1.3%	3.51
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Abu Dhabi National Oil Co.	4.09	3.85	6.2%	52.29
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Abu Dhabi National Energy	1.25	1.15	8.7%	1.57
Umm Al Qaiwain General Inv.	1.37	1.37	0.0%	0.00	Bank of Sharjah PJSC	0.55	0.50	9.0%	0.33

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
MM Group For Industry And International Trade	5.08	1.8%	-26.2%	7.42	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	1.91	-5.5%	-20.4%	4.91
Egyptian Kuwaiti Holding	21.23	1.3%	8.0%	11.62	Ibsinsa Pharma	3.07	-5.3%	-32.8%	3.32
Medinet Nasr Housing	1.96	1.2%	-32.8%	3.32	T M G Holding	8.00	-3.6%	-11.8%	52.30
Heliopolis Housing	4.64	1.1%	-30.8%	17.55	Orascom Development Egypt E-finance For Digital and Financial Investments	3.99	-2.7%	-8.3%	0.30
ELSWEDY ELECTRIC	7.58	0.7%	-22.9%	7.05		17.40	-2.1%	15.9%	14.49
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Telecom Egypt	16.94	16.94	0.0%	10.44	Cairo For Investment And Real Estate Development	9.98	9.98	0.0%	8.68
Sidi Kerir Petrochemicals - SIDPEC	7.52	7.52	0.0%	4.72	Commercial International Bank	41.70	41.70	0.0%	313.08
Oriental Weavers	7.97	7.97	0.0%	0.30	Credit Agricole	7.30	7.30	0.0%	1.72
MM Group For Industry And International Trade	5.08	5.08	0.0%	7.42	GB AUTO	5.31	5.31	0.0%	1.67
Misr Fertilizers Production Company - Mopco	91.21	91.21	0.0%	1.89	Ibsinsa Pharma	3.07	3.07	0.0%	5.17

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Infosys	1891.00	3.8%	0.2%	19263.289	Indian Oil	120.50	-2.6%	8.1%	1802.83
Hdfc Bank	1442.25	3.3%	-2.5%	17933.87	ONGC	171.60	-2.3%	20.5%	3481.87
State Bank Of India	485.50	3.2%	5.4%	13331.99	HUL	2059.75	-1.7%	-12.7%	3565.16
Axis Bank	711.45	3.0%	4.8%	7524.02	Tata Motors	412.50	-1.4%	-14.5%	16693.28
Icici Bank	697.50	2.9%	-5.8%	17036.14	HDFC Life Insurance Company	512.75	-1.2%	-21.1%	2314.61
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Sun Pharma Industries	891.50	911.80	-2.2%	3474.96	HDFC Life Insurance Company	512.75	497.05	3.2%	2314.61
Infosys	1891.00	1953.90	-3.2%	19263.29	Shree Cement	22388.95	21650.00	3.4%	698.26
Power Grid Corp Of India	212.90	223.40	-4.7%	2002.24	Britannia Inds.	3195.00	3050.00	4.8%	1065.00
Hindalco Industries	590.70	623.00	-5.2%	4630.93	Eicher Motors	2313.50	2159.55	7.1%	1553.84
Titan Company	2544.75	2687.25	-5.3%	2522.40	Ultratech Cement	6052.00	5629.20	7.5%	2812.21

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Standard Chartered Bank Kenya Ltd	140.75	7.4%	9.7%	8.88	East African Breweries Limited	150.00	-2.0%	-9.1%	11.70
Diamond Trust Bank Limited	56.75	1.3%	-4.6%	0.02	Kenya Power & Lighting Limited	1.54	-1.9%	-12.0%	0.81
KCB Group Plc	45.05	0.8%	-0.9%	17.50	Nation Media Group	18.75	-1.6%	1.6%	0.13
Absa Bank Kenya	12.15	0.4%	2.5%	1.29	NCBA Group Plc	24.20	-1.4%	-4.0%	1.74
The Cooperative Bank of Kenya Ltd	12.90	0.4%	-0.4%	15.19	Centum Investment Company Plc	13.35	-1.1%	-5.3%	0.13
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
Stanbic Holdings	100.00	100.00	0.0%	0.00	Centum Investment Company Plc	13.35	13.00	2.7%	0.13
Absa Bank Kenya	12.15	12.50	-2.8%	1.29	Kengen Limited	3.75	3.65	2.7%	1.40
British American Tobacco Kenya Ltd	491.00	512.00	-4.1%	2.21	East African Breweries Limited	150.00	145.00	3.4%	11.70
Standard Chartered Bank Kenya Ltd	140.75	150.00	-6.2%	8.88	Safaricom Plc	35.50	34.05	4.3%	96.35
Equity Group Holdings Plc	51.25	55.00	-6.8%	18.81	Diamond Trust Bank Limited	56.75	54.00	5.1%	0.02

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Aldawaa Medical Services Co.	78.60	7.7%	0.0%	1932.53	Saudi Arabian Amiantit Co.	46.45	-5.6%	159.5%	5.89
Saudi Electricity Co.	30.50	4.1%	27.2%	200.61	Etihad Atheeb Telecommunication	57.90	-5.6%	96.9%	31.76
Methanol Chemicals Co.	43.20	2.4%	20.0%	52.40	Rabigh Refining and Petrochemical Co.	25.40	-4.9%	22.7%	112.75
National Medical Care Co.	71.00	2.3%	13.4%	18.35	Al-Jouf Agricultural Development Co.	55.50	-4.8%	-5.0%	47.77
Riyad Bank	37.40	1.9%	38.0%	34.29	Mouwasat Medical Services Co.	206.00	-4.4%	18.5%	12.91
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Scientific and Medical Equipment House Co.	68.00	68.00	0.0%	62.97	Allied Cooperative Insurance Group	18.40	18.40	0.0%	3.01
Elm Co.	195.20	195.20	0.0%	151.77	Fawaz Abdulaziz Alhokair Co.	15.00	15.00	0.0%	12.18
Saudi Tadawul Group Holding Co.	161.00	161.00	0.0%	37.20	Savola Group	34.40	34.40	0.0%	45.44
Development Works Food Co.	257.20	257.20	0.0%	11.98	Tanmiah Food Co.	77.60	77.60	0.0%	14.63
International Company for Water and Power Projects	111.00	111.00	0.0%	162.97	BinDawood Holding Co.	91.10	91.10	0.0%	4.26

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mondi PLC	29160.00	4.3%	-26.2%	37464.30	Naspers Ltd	155789.00	-13.1%	-37.0%	236274.12
Aspen Pharmacare Holdings	17600.00	3.2%	-21.6%	40385.44	Prosus NV	76518.00	-11.4%	-41.6%	172139.79
Absa Group Ltd	17745.00	2.5%	16.3%	74640.33	Northam Platinum	22736.00	-6.3%	8.5%	49478.83
FirstRand Ltd	7193.00	2.5%	18.3%	124096.94	Impala Platinum Holdings Ltd	22818.00	-5.7%	1.4%	83667.40
Capitec Bank Holdings Ltd	210984.00	1.8%	3.4%	37497.98	Sibanye Stillwater	6275.00	-5.0%	27.8%	94163.90
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val(mn R)
FirstRand Ltd	7193.00	7245.00	-0.7%	124096.94	Prosus NV	76518.00	74201.00	3.1%	172139.79
Nedbank Group Ltd	22386.00	22697.00	-1.4%	24588.13	Naspers Ltd	155789.00	150778.00	3.3%	236274.12
Vodacom Group Ltd	15530.00	15852.00	-2.0%	19911.42	Growthpoint Properties Ltd	1265.00	1212.00	4.4%	14876.31
Sanlam Ltd	6605.00	6778.00	-2.6%	60291.66	Bid Corp Ltd	28934.00	27118.00	6.7%	40113.90
Shoprite Holdings Ltd	23159.00	23846.00	-2.9%	43399.62	SPAR Group Ltd/The	16158.00	15132.00	6.8%	12752.27

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietjet Aviation	145000.00	4.7%	13.0%	206973.00	Petrovietnam Gas	106000.00	-6.1%	10.2%	147265.80
Tien Phong Commercial Joint Stock Bank	39200.00	1.4%	-4.5%	84695.52	Phu Nhuan Jewelry	98500.00	-5.7%	3.0%	195965.75
Sai Gon Thuong Tin Commercial	32500.00	1.4%	3.2%	681791.50	Masan Group Corp	136100.00	-4.5%	-20.4%	224510.56
Military Commercial Bank	31650.00	0.6%	9.5%	505811.31	Saigon Securities Inc	43200.00	-4.0%	-16.6%	718904.16
Vietcombank	84200.00	0.5%	6.9%	121096.44	Vietnam Rubber Group JSC	45800.00	-3.8%	-1.3%	1550114.74
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietjet Aviation	145000.00	149000.00	-2.7%	206973.00	Vingroup JSC	78300.00	77000.00	1.7%	205357.41
Military Commercial Bank	31650.00	34900.00	-9.3%	505811.31	Vinamilk	77200.00	75000.00	2.9%	127742.84
Mobile World Inv. Corp	131700.00	145500.00	-9.5%	161556.39	Vinhomes	74500.00	71604.04	4.0%	256071.40
FPT Corp	91800.00	101800.00	-9.8%	178367.40	Saigon Beer Alcohol Beverage Corp.	154000.00	136782.28	12.6%	23793.00
Tien Phong Commercial Joint Stock Bank	39200.00	44000.00	-10.9%	84695.52	Vietnam JSC Bank	31900.00	28014.62	13.9%	158938.56

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