

Daily Market Report

21 April 2022

JSE

JSE All-Share slipped by 0.06% to close at 73,783.44 points on Wednesday, as Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 219.33 points, down marginally by 0.03% on Wednesday with Setao Côte d'Ivoire and Sicable Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index jumped by 1.25% to close at 48,138.71 points on Wednesday, as Oil & Gas, Industrial and Consumer Goods sector recorded gains.

EGX

EGX 30 Index dropped by 1.71% to close at 10,444.76 points on Wednesday, as market lost LE 4.09 billion of market cap, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.29% to close at 985.22 points on Wednesday.

African Markets

Nigeria: NSE 30 Index increased by 0.44% and closed at 1,829.80 points on Wednesday. Guinness and Nigerian Breweries were the top gainers.

Egypt: EGX 30 Index dropped by 1.71% to close at 10,444.76 points on Wednesday, as market lost LE 4.09 billion of market cap, amid Egyptian and foreign selling.

Kenya: NSE 20 Index inched down by 0.01% and closed at 1,857.16 points on Wednesday. WPP Scangroup and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index was down by 0.15% and closed at 66,765.06 points on Wednesday, as Financial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 0.06%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.03%

NSE

Nigerian Stock Exchange ▲ 1.25%

EGX

Egyptian Stock Exchange ▼ 1.71%

ESG

Casablanca Stock Exchange ▲ 0.29%

Nigeria Key Indicators

	Current
Inflation	15.92%
Exchange Rate	₦416.08
INTERBANK RATES	
OPR	12.33 ▲
Overnight	12.67 ▲

Other Emerging Markets

Abu Dhabi: ADX Index rose by 0.85% to close at 9,988.13 points on Wednesday, as gains in the Financial and Industry sectors led shares higher. MSCI UAE increased by 0.38% to close at 528.83 points.

Vietnam: VN-30 Index decreased by 0.35% to close at 1,435.50 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.61% to close at 938.81 points.

Saudi Arabia: Tadawul All Share Index rose by 1.21% to close at 13,668.54 points on Wednesday, as gains in the Media & Publishing, Financial Services and Petrochemicals sectors led shares higher. MSCI Saudi Arabia climbed by 1.30% to close at 1,923.48 points.

India: Nifty 50 Index rose by 1.05% to close at 17,136.55 points on Wednesday, as gains in the Auto, Oil & Gas and Technology sectors led shares higher. MSCI India advanced by 1.07% to close at 2,026.84 points.

News

Nigeria:

External reserves return to growth path, gain \$243.83m
Power tariff shortfall hits N247bn, govt clears debt Dec – FG report
Domestic, int'l passengers rise by 44%, hit 15.23million

Kenya:

Google to open Nairobi tech hub in Sh115.5bn Africa investment
Treasury raises Sh60bn from April bond sales
KPC Acquires Kenya Petroleum Refineries Ltd from Essar Energy

Abu Dhabi:

Abu Dhabi's National Marine Dredging posts 146% rise in 1Q22 net profit
Abu Dhabi's Emirates Driving posts 60% rise in Q1 2022 profit
UAE to launch treasury bonds with auction size of \$408mln

Saudi Arabia:

IMF expects Saudi economy growth to more than double in 2022
Saudi Arabia to invest \$100m in Tourism Support Fund alongside World Bank
Saudi lender Bank Albilad posts 25% growth in Q1 profit

Egypt:

Egypt signs MoU for French, Emirati projects to produce green fuel in SCZone
Egypt, KfW sign development financing agreement worth €26M
Egypt achieved primary surplus of 1.46% of GDP in 2020/21

South Africa:

5.9% inflation rate marks 11th month above Sarb's midpoint
Barclays looks to sell \$740m stake in Absa
Rand battered by load shedding, floods, lower global growth, war in Ukraine

India:

Govt eyes SPAC framework to enable new listing route
Tata Elxsi Q4 net profit rises 39% to Rs 160 crore
HDFC to sell 10% stake in HDFC Capital to ADIA

Vietnam:

Vietnam plans two-thirds cut in thermal power
Power generation capacity projected to reach 146,000 MW by 2030
Vietjet announces direct routes between Viet Nam and India

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,988.13	0.9%	0.2%	0.4%	17.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,444.76	-1.7%	-2.2%	-7.1%	-12.3%	EGP/USD	18.49	0.1%	17.7%
India	17,136.55	1.0%	-1.9%	-1.9%	-1.3%	INR/USD	76.20	-0.4%	2.5%
Kenya	1,857.16	-0.01%	-0.8%	0.6%	-2.4%	KES/USD	115.55	0.1%	2.1%
Nigeria	1,829.80	0.4%	0.4%	2.2%	6.2%	NGN/USD	416.00	0.0%	0.5%
Saudi Arabia	13,668.54	1.2%	0.3%	4.4%	20.6%	SAR/USD	3.75	0.0%	-0.1%
South Africa	66,765.06	-0.2%	0.4%	-2.5%	-0.4%	ZAR/USD	15.06	0.6%	-5.6%
Vietnam	1,435.50	-0.4%	-3.9%	-4.8%	-6.5%	VND/USD	22,964.50	0.0%	0.8%

MSCI Emerging Markets

MSCI Frontier	605.23	0.0%	-1.0%	-0.5%	-9.1%	Brent Crude (\$)	106.80	-0.4%	37.3%
MSCI Frontier 100	1,414.50	-0.2%	-1.4%	-0.8%	-7.7%	Gold (\$)	1,955.60	-0.2%	6.9%
MSCI Emerging	1,095.63	0.0%	-1.6%	-4.0%	-11.1%	Copper (\$)	10,223.00	-0.8%	5.2%
MSCI World (USD)	2,994.64	0.3%	1.2%	-1.9%	-7.3%	Coffee (\$)	195.96	-0.7%	-1.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guinness	82.25	10.0%	110.9%	30.87	Unilever	12.20	-4.3%	-9.0%	26.52
Nigerian Breweries	48.00	8.6%	0.0%	226.32	Zenith	24.00	-3.4%	-4.0%	571.51
Airtel Africa	1320.00	4.7%	38.2%	305.14	Guaranty	23.70	-3.3%	-8.8%	160.03
Seplat Petroleum	1030.00	4.6%	58.5%	383.32	Julius Berger	27.00	-1.5%	20.8%	26.05
Sterling	1.49	2.8%	-0.7%	3.58	Fidelity	3.85	-1.3%	51.0%	79.96
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.12	3.12	0.0%	10.73	Unilever	12.20	10.50	16.2%	26.52
UACN	11.55	11.55	0.0%	17.79	Cap	19.80	15.25	29.8%	0.25
Transcorp Hotels	4.95	4.95	0.0%	112.14	Guaranty	23.70	18.00	31.7%	160.03
Total	238.50	238.50	0.0%	112.14	Sterling	1.49	1.13	31.9%	3.58
Seplat Petroleum	1030.00	1030.00	0.0%	383.32	Cadbury	8.40	6.30	33.3%	0.83

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easylease motorcycle rentals	57.55	15.0%	98.4%	10.23	Q HOLDING PSC	4.86	-4.0%	10.2%	36.26
Abu Dhabi National Hotels	4.00	4.7%	5.8%	1.35	Abu Dhabi National Energy	1.33	-2.9%	0.8%	6.62
ESG EMIRATES STALLIONS GROUP P.J.S.C	8.20	3.8%	2.5%	14.91	Gulf Pharmaceutical Ind.	1.41	-2.8%	-23.4%	0.61
First Abu Dhabi Bank	22.80	3.6%	21.0%	295.65	Al Dar Properties	5.15	-2.7%	29.1%	289.46
United Arab Bank	0.65	3.5%	-3.1%	0.02	Manazel PJSC	0.48	-2.6%	-8.2%	9.00
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	Abu Dhabi National Oil Co.	4.07	4.07	0.0%	0.00
Insurance House	0.91	0.91	0.0%	0.00	Emirates Telecom. Group Company	35.70	35.70	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	ADNOC Drilling co. PJSC	3.71	3.70	0.3%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Al Dar Properties	5.15	5.12	0.6%	0.00
Umm Al Qaiwain General Inv.	0.00	0.00	0.0%	0.00	APEX Investments	5.43	5.00	8.6%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian Kuwaiti Holding-EGP	22.25	3.5%	13.2%	4.52	Telecom Egypt	15.26	-6.4%	-12.5%	5.71
Cleopatra Hospital Company	5.30	1.9%	7.7%	6.94	Commercial International Bank	41.86	-4.0%	-22.7%	0.57
Medinet Nasr Housing	2.13	1.9%	-27.1%	5.02	Ezz Steel	13.26	-3.8%	-11.5%	7.16
Oriental Weavers	7.50	1.8%	-13.7%	11.43	Credit Agricole Egypt	6.51	-3.3%	4.6%	12.45
Abou Kir Fertilizers	24.40	1.7%	13.5%	15.08	Alexandria Mineral Oils Company	3.49	-2.5%	-13.1%	1.22
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	15.26	15.26	0.0%	4.90	Commercial International Bank	41.86	41.86	0.0%	142.47
Sidi Kerir Petrochemicals - SIDPEC	7.36	7.36	0.0%	2.96	Credit Agricole Egypt	6.51	6.51	0.0%	0.57
Oriental Weavers	7.50	7.50	0.0%	11.43	Fawry For Banking TechnologyAnd Electronic Payment	4.83	4.83	0.0%	13.03
Misr Fertilizers ProductionCompany - Mopco	96.00	96.00	0.0%	1.52	GB AUTO	3.88	3.88	0.0%	2.19
Heliopolis Housing	5.21	5.21	0.0%	25.61	Ibnsina Pharma	2.54	2.54	0.0%	1.17

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	391.75	4.2%	1.6%	3312.376	Bajaj Finance	7049.00	-2.9%	1.0%	11063.86
Tata Motors	440.90	3.8%	-8.6%	8571.57	Bajaj Finserv	15520.00	-1.3%	-5.4%	3924.21
Shree Cement limited	25775.00	3.7%	-4.5%	1177.76	Icici Bank	756.70	-1.3%	2.2%	12153.43
Eicher Motors	2544.00	3.6%	-1.8%	3024.51	Jsw Steel	739.20	-1.0%	12.7%	3490.49
Maruti Suzuki India	7696.10	3.5%	3.6%	4140.22	Larsen & Toubro	1691.00	-0.9%	-10.8%	6461.26
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	922.95	948.00	-2.6%	1344.54	Hdfc Bank	1356.00	1292.00	5.0%	33284.02
Coal India	199.00	205.55	-3.2%	7716.21	Kotak Mahindra Bank	1724.00	1626.00	6.0%	5457.67
NTPC	160.70	166.35	-3.4%	3228.48	Hero Motocorp	2277.00	2146.85	6.1%	968.55
UPL	826.00	864.70	-4.5%	2487.30	HDFC	2185.00	2046.00	6.8%	11783.18
ITC	259.80	273.15	-4.9%	6391.14	Britannia Inds.	3300.00	3050.00	8.2%	780.01

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	24.70	7.2%	2.9%	0.07	WPP Scangroup Plc	4.01	-7.2%	-33.2%	0.07
Centum Investment Company Plc	12.25	2.5%	-23.7%	0.02	Kenya Power & Lighting Limited	1.40	-6.7%	-18.1%	3.02
Nation Media Group	21.85	1.6%	41.4%	2.13	The Cooperative Bank of Kenya Ltd	12.50	-2.7%	0.0%	0.60
Standard Chartered Bank Kenya Ltd	146.25	1.4%	1.4%	4.27	NCBA Group Plc	26.15	-2.6%	-2.2%	1.38
Absa Bank Kenya	12.55	1.2%	29.9%	8.79	Kenya Reinsurance Corporation Ltd	2.15	-1.8%	-7.3%	0.56
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	105.00	105.00	0.0%	37.91	East African Breweries Limited	146.00	145.00	0.7%	7.58
Standard Chartered Bank Kenya Ltd	146.25	148.75	-1.7%	4.27	Kenya Reinsurance Corporation Ltd	2.15	2.10	2.4%	0.56
Absa Bank Kenya	12.55	12.95	-3.1%	8.79	Kengen Limited	3.58	3.49	2.6%	0.30
British American Tobacco Kenya Ltd	489.75	512.00	-4.3%	2.15	Diamond Trust Bank Limited	56.00	54.00	3.7%	0.22
Equity Group Holdings Plc	49.65	55.00	-9.7%	67.99	Safaricom Plc	35.05	33.50	4.6%	74.06

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Home Loans Co.	26.00	30.0%	0.0%	313.55	Leejam Sports Co.	123.80	-5.9%	13.6%	190.85
Saudi Research and Marketing Group	270.00	5.8%	37.6%	35.01	CHUBB Arabia Cooperative Insurance Co.	29.30	-3.9%	-19.8%	16.14
Al Alamiya for Cooperative Insurance Co.	23.40	5.4%	2.5%	23.81	Anaam International Holding Group	72.90	-3.4%	-10.8%	22.91
Saudi British Bank	44.55	5.1%	35.0%	85.18	Ash-Sharqiyah Development Co.	87.20	-3.4%	-7.8%	16.96
Saudi Printing and Packaging Co.	19.98	4.6%	-9.0%	14.87	Jabal Omar Development Co.	30.10	-2.9%	18.5%	82.47
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)
Saudi Home Loans Co.	26.00	26.00	0.0%	313.55	Allied Cooperative Insurance Group	16.08	16.08	0.0%	1.80
Almasane Alkobra Mining Co.	113.40	113.40	0.0%	135.51	Fawaz Abdulaziz Alhokair Co.	13.28	13.28	0.0%	7.77
Nahdi Medical Co.	167.00	167.00	0.0%	94.97	Tanmiah Food Co.	83.80	83.80	0.0%	15.33
Scientific and Medical Equipment House Co.	91.50	91.50	0.0%	75.12	The Mediterranean and Gulf Insurance and Reinsurance Co.	14.80	14.80	0.0%	9.05
Elm Co.	224.40	224.40	0.0%	54.52	BinDawood Holding	102.00	102.00	0.0%	10.23

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Tiger Brands	15438.00	5.8%	-14.7%	19606.26	Discovery Holdings	16425.00	-4.0%	14.4%	103970.25
Mondi	29100.00	3.8%	-26.4%	20963.93	Absa	17700.00	-3.3%	16.0%	43365.00
Bidvest Group Ltd	22213.00	2.5%	17.2%	41538.31	Firststrand	6798.00	-2.9%	11.8%	114342.36
Richemont DRC	19270.00	2.5%	-20.2%	49523.90	Naspers	149492.00	-2.2%	-39.5%	112797.69
Investec	9639.00	2.0%	10.1%	8257.06	Old Mutual	1209.00	-2.0%	-7.7%	21387.21
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)
Glencore PLC	9960.00	10289.00	-3.2%	35059.20	Naspers Ltd	149492.00	139250.00	7.4%	112797.69
Exxaro Resources Ltd	23015.00	23873.00	-3.6%	15786.91	Prosus NV	73409.00	67645.00	8.5%	68957.48
Shoprite Holdings Ltd	23730.00	24723.00	-4.0%	46985.40	SPAR Group Ltd/The	16517.00	15132.00	9.2%	7360.80
Anglo American PLC	79200.00	83396.65	-5.0%	90288.00	NEPI Rockcastle PLC	9607.00	8605.00	11.6%	6541.31
Reinet Investments SCA	33144.00	34965.00	-5.2%	14413.33	Mondi PLC	29100.00	25062.00	16.1%	21043.08

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	124300.00	3.2%	-27.3%	137231.62	Phat Dat Real Estate Development Corp	63500.00	-26.0%	-33.3%	173.838.17
Saigon Beer Alcohol Beverage Corp.	172000.00	1.8%	13.9%	54840.99	Vietnam Rubber Group JSC	32550.00	-7.0%	-11.9%	97214.51
Vietcombank	78400.00	0.9%	-0.5%	70.740.15	Petrovietnam Gas	106600.00	-6.4%	10.8%	155.216.79
Asia Commercial JS Bank	31900.00	0.8%	-7.5%	143.555.02	PetroVietnam Power Corp	13050.00	-3.3%	-25.4%	221808.64
Military Commercial Bank	29500.00	0.7%	2.1%	385452.62	Vinhomes	66800.00	-3.1%	-18.5%	402.268.27
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	142000.00	142000.00	0.0%	110159.67	Hoa Phat Group JSC	43200.00	43200.00	0.0%	576253.28
Vingroup JSC	79300.00	79300.00	0.0%	135.637.53	Military Commercial Bank	29500.00	29500.00	0.0%	385452.62
Techcombank	43050.00	43050.00	0.0%	344885.95	Vietnam National Petroleum Group	51300.00	51300.00	0.0%	89439.07
Phu Nhuan Jewelry	118900.00	118900.00	0.0%	120640.79	Sai Gon Thuong Tin Commercial	27550.00	27550.00	0.0%	334.133.35
Mobile World Inv. Corp	156000.00	156000.00	0.0%	296421.79	Tien Phong Commercial Joint Stock Bank	35500.00	35500.00	0.0%	137.804.32

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