

Daily Market Report

13 May 2022

JSE

JSE All-Share declined by 1.70% to close at 67,251.89 points on Thursday, as Industrial and Resource sectors recorded losses.

BRVM

BRVM Composite Index closed at 215.98 points, up by 0.40% on Thursday with Air Liquide Côte d'Ivoire and Sogb Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.15% to close at 52,917.76 points on Thursday, as the Consumer Goods, Industrial, and Oil & Gas sectors recorded gains.

EGX

EGX 30 Index declined by 1.63% to close at 10,678.98 points on Thursday, as market shed around LE 12.11 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index declined by 1.05% to close at 939.59 points on Thursday.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 1.70%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.40%

NSE

Nigerian Stock Exchange ▲ 0.15%

EGX

Egyptian Stock Exchange ▼ 1.63%

ESG

Casablanca Stock Exchange ▼ 1.05%

African Markets

Nigeria: NSE 30 Index increased by 0.51% and closed at 2,055.91 points on Thursday. Lafarge Africa and International Breweries were the top gainers.

Egypt: EGX 30 Index declined by 1.63% to close at 10,678.98 points on Thursday, as market shed around LE 12.11 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index declined by 1.17% and closed at 1,733.89 points on Thursday. WPP Scangroup and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index declined by 1.85% to close at 60,641.20 points on Thursday, as Industrial and Resource sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	15.92%
Exchange Rate	₦415.83
INTERBANK RATES	
OPR	5.00 ▼
Overnight	5.75 ▼

Other Emerging Markets

Abu Dhabi: ADX Index sank 5.84% to close at 9,222.99 points on Thursday, as all sectors recorded losses. MSCI UAE tumbled by 7.23% to close at 454.63 points.

Vietnam: VN-30 Index fell sharply by 5.19% to close at 1,279.76 points on Thursday, as the market witnessed strong sell-off in blue chip stocks. MSCI Vietnam fell by 4.52% to close at 853.90 points.

Saudi Arabia: Tadawul All Share Index fell by 4.06% to close at 12,853.30 points on Thursday, as losses in the Financial Services, Telecoms & IT and Insurance sectors led shares lower. MSCI Saudi Arabia tanked by 4.38% to close at 1,785.94 points.

India: Nifty 50 Index dropped by 2.22% to close at 15,808.00 points on Thursday, as losses in the Power, Metals and Banking sectors propelled shares lower. MSCI India dropped by 2.19% to close at 1842.11 points.

News

Nigeria:

NBS: Nigeria's GDP improves by 4.03%
Agric imports hit N2.7tn despite N129bn intervention loans
Nigerians' spending on household consumption rises to N108tn – NBS

Kenya:

Safaricom retains dividend payout as it enters Ethiopia
Equity makes Net Profit of KSh 11.5Billion in 1Q22
CBK Collects KSh 23.1B at Weekly T-Bills Auction

Abu Dhabi:

Opec cuts 2022 demand forecast as global economy slows
UAE lists first dirham-denominated treasury bond on Nasdaq Dubai
Aramex is first on DFM to allow 100% foreign ownership

Saudi Arabia:

Saudi chemical giant SABIC achieves higher Q1 profit as sales hit \$14bn
Aramco explores hydrogen energy cooperation with Thailand's PTT
Aramco profit estimates at \$38bn, eyes world's top-valued firm spot

Egypt:

Egypt, Total Energies sign MoU to produce 300K tons of green ammonia
Egypt targets to issue yuan-dominated bonds to diversify financing tools
Egypt Post's savings fund deposits rise to LE 103.1 in 2020/21

South Africa:

AFC plans \$2bn fund to support Africa's economic recovery
SA sets plans to cash in on revived national carrier
South Africa's Budget Deficit Narrower Than Estimate at 5.2%

India:

Retail inflation at 8-year high of 7.8% on food, fuel costs
Govt's Rs 16K crore dues conversion into 33% stake to be completed in coming weeks: VIL
TaMo cuts Q4 losses to Rs 992 crore

Vietnam:

VN's GDP to grow by 5.5-6%, risk and inflation on the rise
PM proposes more US financial support for clean energy, climate change response
Denmark pours 100 million USD into Binh Duong province

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,222.99	-5.8%	-8.4%	-8.5%	8.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,678.98	-1.6%	-3.9%	-3.3%	-10.3%	EGP/USD	18.33	-0.3%	16.7%
India	15,808.00	-2.2%	-3.7%	-7.6%	-8.9%	INR/USD	77.42	0.2%	4.2%
Kenya	1,733.89	-1.2%	-1.2%	-3.7%	-8.9%	KES/USD	116.15	0.0%	2.7%
Nigeria	2,055.91	0.5%	5.5%	9.0%	19.4%	NGN/USD	415.75	-0.1%	0.5%
Saudi Arabia	12,835.30	-4.1%	-7.1%	-6.5%	13.3%	SAR/USD	3.75	0.0%	-0.1%
South Africa	60,641.20	-1.9%	-1.1%	-7.4%	-9.6%	ZAR/USD	16.09	0.1%	0.8%
Vietnam	1,279.76	-5.2%	-6.8%	-9.7%	-16.7%	VND/USD	23,098.50	0.2%	1.4%

MSCI Emerging Markets

MSCI Frontier	551.07	-2.5%	-5.0%	-6.5%	-17.2%	Brent Crude (\$)	107.45	-0.1%	38.1%
MSCI Frontier 100	1,278.07	-2.8%	-5.2%	-7.3%	-16.6%	Gold (\$)	1,824.60	-1.6%	-0.2%
MSCI Emerging	987.82	-2.3%	-4.2%	-8.2%	-19.8%	Copper (\$)	9,090.00	-2.7%	-6.5%
MSCI World (USD)	2,639.75	-0.5%	-4.4%	-5.6%	-18.3%	Coffee (\$)	195.07	6.3%	-1.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	31.75	9.9%	34.0%	601.95	Cadbury	16.40	-3.5%	86.4%	63.16
International Breweries	9.75	9.6%	107.4%	77.86	Ecobank	12.50	-3.1%	49.7%	16.44
Presco	200.00	8.1%	127.8%	437.09	Fidelity	3.45	-2.0%	35.3%	36.91
P Z Cussons	11.80	6.8%	93.4%	4.24	Guaranty	23.60	-1.5%	-9.2%	315.11
Transnational Corporation	1.29	6.6%	30.3%	122.72	Zenith	24.00	-1.2%	-4.0%	590.08
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	3.62	3.62	0.0%	2.45	Guaranty	23.60	18.00	31.1%	315.11
UACN	14.50	14.50	0.0%	53.27	Unilever	14.00	10.50	33.3%	6.01
Transcorp Hotels	4.45	4.45	0.0%	0.03	Sterling	1.54	1.13	36.3%	6.35
Total	234.50	234.50	0.0%	48.75	Transcorp Hotels	4.45	3.25	36.9%	0.03
Seplat Petroleum	1200.00	1200.00	0.0%	63.74	UBN	6.45	4.65	38.7%	1.34

Abu Dhabi

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
					Abu Dhabi Islamic Bank	7.38	-10.0%	7.4%	47.48
					Easylease motorcycle rentals	45.00	-10.0%	55.2%	3.80
					National Marine Dredging	24.32	-10.0%	86.5%	3.54
					GHITHA HOLDING P.J.S.C.	89.75	-10.0%	226.4%	25.86
					Al Dar Properties	5.06	-10.0%	26.8%	349.80
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	National Bank of Fujairah	4.99	4.98	0.2%	0.00
Insurance House	0.87	0.87	0.0%	0.00	Gulf Pharma Ind.	1.27	1.25	1.6%	0.43
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Abu Dhabi National Oil Co.	3.95	3.80	3.9%	78.16
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Du	6.20	5.90	5.1%	5.32
Gulf Medical Projects	2.75	2.75	0.0%	0.00	Agthia Group	4.46	4.20	6.2%	18.78

*No gainers on 12/5

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Orascom Construction PLC	81.00	2.6%	6.6%	6.97	Palm Hills Development	1.49	-5.0%	3.1%	7.41
Fawry For Banking Tech And Electronic Payment	4.85	0.6%	-62.1%	34.52	Citadel Capital - Common Shares	1.31	-4.0%	8.8%	8.59
					Ezz Steel	14.00	-3.9%	-6.6%	10.65
					Heliopolis Housing	5.52	-3.7%	-14.6%	0.47
					Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.26	-3.4%	-5.8%	3.03
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	16.05	16.05	0.0%	32.68	Commercial International Bank	42.10	42.10	0.0%	91.93
Sidi Kerir Petrochemicals - SIDPEC	8.04	8.04	0.0%	7.41	Credit Agricole Egypt	6.24	6.24	0.0%	2.14
Oriental Weavers	7.74	7.74	0.0%	7.20	Fawry For Banking Tech& Electric Pay	4.85	4.85	0.0%	34.52
Misr Fertilizers ProductionCompany - Mopco	106.00	106.00	0.0%	32.11	GB AUTO	4.00	4.00	0.0%	13.85
Heliopolis Housing	5.52	5.52	0.0%	17.17	Ibnsina Pharma	2.40	2.40	0.0%	8.05

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Wipro	475.50	0.8%	-33.5%	3428.517	Adani Ports And Sez.	715.70	-5.8%	-2.0%	7631.55
Eicher Motors	2395.00	0.2%	-7.6%	993.89	Indusind Bank	871.00	-5.7%	-1.9%	4191.84
Hcl Technologies	1062.00	0.1%	-19.5%	3392.59	Tata Motors	371.90	-4.2%	-22.9%	12508.52
					Tata Steel	1118.90	-4.0%	0.7%	10586.57
					Hindalco Industries	406.70	-3.8%	-14.5%	9601.68
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	253.45	273.15	-7.2%	5049.47	Nestle India Limited	16225.00	16126.75	0.6%	1164.57
Bharti Airtel	703.40	781.80	-10.0%	4789.53	Hdfc Bank	1302.50	1292.00	0.8%	14633.77
NTPC	148.40	166.35	-10.8%	1770.77	Axis Bank	648.00	637.00	1.7%	7291.56
UPL	768.90	864.70	-11.1%	2307.09	Wipro	475.50	462.15	2.9%	3428.52
Mahindra & Mahindra	866.00	979.00	-11.5%	4228.77	Bharat Petroleum	341.20	331.10	3.1%	1314.60

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
British American Tobacco Kenya Ltd	421.00	2.9%	-4.6%	0.08	WPP Scangroup Plc	3.41	-5.0%	-17.6%	0.23
Nairobi Securities Exchange Plc	8.14	1.8%	1.8%	0.26	Kenya Power & Lighting Limited	1.41	-4.7%	-19.4%	3.64
KenGen Limited	3.58	0.6%	-14.6%	0.29	Kenya Reinsurance Corporation Ltd	2.15	-4.4%	-6.5%	0.17
KCB Group Plc	35.85	0.4%	-21.1%	13.97	Centum Investment Company Plc	11.55	-3.8%	-18.1%	0.33
NCBA Group Plc	26.05	0.4%	3.4%	10.08	Diamond Trust Bank Limited	51.75	-2.8%	-13.0%	0.16
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	104.00	106.00	-1.9%	17.71	Centum Investment Company Plc	11.55	11.50	0.4%	0.33
Bamburi Cement Limited	36.95	40.00	-7.6%	1.54	East African Breweries Limited	140.25	139.00	0.9%	0.39
NCBA Group Plc	26.05	29.00	-10.2%	10.08	Diamond Trust Bank Limited	51.75	51.25	1.0%	0.16
The Cooperative Bank of Kenya Ltd	12.25	14.00	-12.5%	3.22	KenGen Limited	3.58	3.49	2.6%	0.29
Total Kenya Ltd	23.20	27.50	-15.6%	0.00	Safaricom Plc	31.85	31.00	2.7%	157.73

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Industrial Export Co.	60.60	10.0%	-78.8%	0.35	Banque Saudi Fransi	48.80	-10.0%	3.3%	93.90
Saudi Company for Hardware	44.25	2.7%	-9.3%	49.91	Riyad Bank	35.20	-8.6%	29.9%	134.93
Saudi Re for Cooperative Reinsurance Co.	15.60	2.4%	-6.0%	14.12	Herfy Food Services	51.00	-8.3%	-18.3%	38.56
Development Works Food Co.	264.80	2.2%	-6.2%	44.02	Buruj Cooperative Insurance Co.	23.00	-8.2%	4.1%	5.68
Etihad Atheeb Telecommunication Co.	56.00	2.0%	90.5%	31.75	Bupa Arabia for Cooperative Insurance Co.	155.40	-7.5%	18.3%	24.87
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)
Almasane Alkobra Mining Co.	100.80	100.80	0.0%	142.36	Allied Cooperative Insurance Group	16.30	16.30	0.0%	3.03
Scientific and Medical Equipment House Co.	84.60	84.60	0.0%	31.73	Fawaz Abdulaziz Alhokair Co.	14.22	14.22	0.0%	26.77
Elm Co.	255.00	255.00	0.0%	243.45	Savola Group	36.05	36.05	0.0%	48.86
Almunajem Foods Co.	70.70	70.70	0.0%	54.34	Tanmiah Food Co.	74.80	74.80	0.0%	8.35
Saudi Tadawul Group Holding Co	197.20	197.20	0.0%	191.46	The Mediterranean and Gulf Insurance and Reinsurance Co.	14.78	14.78	0.0%	4.88

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Clicks Group Ltd	29487.00	4.3%	-6.5%	40944.85	Anglo American Platinum Ltd	150487.00	-6.8%	-14.4%	45193.80
Reinet Investments SCA	32922.00	3.4%	15.1%	15274.43	Sibanye Stillwater Ltd	4395.00	-6.7%	-10.5%	105182.25
Capitec Bank Holdings Ltd	208741.00	3.0%	3.1%	74292.38	Northam Platinum Ltd	16610.00	-6.3%	-20.7%	29006.97
FirstRand Ltd	6681.00	2.0%	9.9%	134241.29	AngloGold Ashanti Ltd	26587.00	-6.0%	-19.1%	82058.44
Naspers Ltd	158465.00	1.6%	-35.9%	152331.61	Gold Fields Ltd	17703.00	-5.7%	1.7%	112114.44
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)
Reinet Investments SCA	32922.00	34965.00	-5.8%	15274.43	Aspen Pharmacare Holdings Ltd	15416.00	14921.00	3.3%	20431.67
British American Tobacco PLC	66000.00	70884.00	-6.9%	41299.37	Northam Platinum Ltd	16610.00	16061.00	3.4%	29006.97
MultiChoice Group	12962.00	13973.00	-7.2%	10761.95	Sibanye Stillwater Ltd	4395.00	4246.00	3.5%	105182.25
Sasol Ltd	37385.00	40798.00	-8.4%	73094.14	SPAR Group Ltd/The	15860.00	15132.00	4.8%	9833.42
Shoprite Holdings Ltd	22262.00	24723.00	-10.0%	36641.43	Mr Price Group Ltd	19793.00	18650.00	6.1%	27899.20

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	164900.00	0.9%	11.6%	39477.06	Vietnam National Petroleum Group	38600.00	-7.0%	-28.4%	80037.10
					Masan Group Corp	104100.00	-7.0%	-26.9%	110512.56
					Bank for Inv. and Devp	33600.00	-6.9%	-9.4%	50665.44
					Techcombank	36300.00	-6.9%	-27.4%	265218.69
					Vincom Retail	26900.00	-6.9%	-10.6%	99634.91
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Saigon Beer Alcohol Beverage Corp.	164900.00	181400.00	-9.1%	39477.06	Vietnam Rubber Group JSC	38250.00	38250.00	0.0%	965911.95
Vietjet Aviation	124800.00	149000.00	-16.2%	79073.28	Hoa Phat Group JSC	38250.00	38250.00	0.0%	965911.95
Mobile World Inv. Corp	134400.00	162800.00	-17.4%	229232.64	Vietnam National Petroleum Group	38600.00	38600.00	0.0%	80037.10
Petrovietnam Gas	105600.00	128400.00	-17.8%	88059.84	Sai Gon Thuong Tin Commercial	21950.00	21950.00	0.0%	531517.06
Phu Nhuan Jewelry	101100.00	124000.00	-18.5%	78635.58	Techcombank	36300.00	36300.00	0.0%	265218.69

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