

Daily Market Report

16 May 2022

JSE

JSE All-Share rose by 2.08% to close at 68,650.69 points on Friday, as Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 217.53 points, up by 0.72% on Friday with Saph Côte d'Ivoire and CIE Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.34% to close at 53,098.46 points on Friday, as the Oil & Gas and Banking sectors recorded gains.

EGX

EGX 30 Index declined by 1.36% to close at 10,534.22 points on Sunday, as market shed around LE 5.92 billion of market cap, amid local and Arab selling.

ESG

Casablanca ESG 10 Index increased by 0.92% to close at 948.25 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 2.08%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.72%
NSE Nigerian Stock Exchange	▲ 0.34%
EGX Egyptian Stock Exchange	▼ 1.36%
ESG Casablanca Stock Exchange	▼ 0.92%

African Markets

Nigeria: NSE 30 Index increased by 0.23% and closed at 2,060.70 points on Friday. Flour Mills and Seplat were the top gainers.

Egypt: EGX 30 Index declined by 1.36% to close at 10,534.22 points on Sunday, as market shed around LE 5.92 billion of market cap, amid local and Arab selling.

Kenya: NSE 20 Index increased by 0.77% and closed at 1,747.22 points on Friday. WPP Scangroup and Diamond Trust Bank were the top gainers.

South Africa: JSE Top 40 Index advanced by 2.23% to close at 61,991.97 points on Friday, as Industrial, Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	15.92%
Exchange Rate	₦415.74
INTERBANK RATES	
OPR	8.67 ▲
Overnight	9.17 ▲

Other Emerging Markets

Abu Dhabi: ADX Index rebounded by 2.93% to close at 9,493.42 points on Friday, as gains in the Consumer Discretionary, Consumer Staples, Energy, Financials, Industrials and Real Estate sectors led shares higher. MSCI UAE surged by 4.08% to close at 473.17 points.

Vietnam: VN-30 Index fell sharply by 4.38% to close at 1,223.76 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam tanked by 3.57% to close at 823.42 points.

Saudi Arabia: Tadawul All Share Index jumped by 2.45% to close at 13,149.29 points on Sunday, as gains in the Energy, Banking and Food & beverages sectors led shares higher. MSCI Saudi Arabia advanced by 2.64% to close at 1,833.02 points.

India: Nifty 50 Index was down by 0.16% to close at 15,782 points on Friday, as losses in the Metals, Power and Banking sectors pushed shares lower. MSCI India decreased by 0.19% to close at 1,838.59 points.

News

Nigeria:

Airtel Africa grows net profit by 82% to \$755m
MTN Nigeria Rewards Shareholders with N174.53bn Dividend
Nine banks' non-performing loans rise, hit N814bn

Kenya:

Safaricom Set to Issue Green Bond to Diversify Financing
Treasury raises tax goal for KRA by Sh33 billion
CBK Accepts KSh 31.7 Billion in May T-Bonds Auction

Abu Dhabi:

Sheikh Mohamed bin Zayed Al Nahyan elected as UAE President
UAE telco e& buys 9.8% stake in Vodafone for \$4.4b
Trade deal to increase UAE imports from India by \$14.3 billion by 2030

Saudi Arabia:

Saudi Arabia records highest quarterly budget surplus in 6 years at \$15 bn
Saudi Aramco profit soars 82% on high oil prices in first quarter
Saudi annual inflation rises to 2.3% in April as costs of food & beverages bite

Egypt:

Egypt to list 12 companies under IPO programme by end of 2022
Agriculture's contribution to GDP increases to more than 15%
Unemployment in Egypt down to 7.2% in 1Q22

South Africa:

SA outlook weakens as power outages, rate hikes and KZN floods bite
Mining and manufacturing production contract in 1Q
Anglo American to return to Zambia with Arc Minerals copper deal

India:

Adani to buy Holcim stake in Ambuja Cements and ACC for \$10.5 billion
Reliance to acquire dozens of brands in \$6.5 bn consumer goods play-sources Maruti to set up new Sonipat plant, invest Rs 11,000cr

Vietnam:

Vietnam targets 10 \$5 bln state-owned firms by 2025
Vietnam enjoys trade surplus of 2.5 bln USD in four months
Steel companies report decline in Q1 profits

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,493.42	2.9%	0.0%	-5.8%	11.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,534.22	-1.4%	-1.4%	-4.6%	-11.5%	EGP/USD	18.32	-0.1%	16.6%
India	15,782.15	-0.2%	0.0%	-7.7%	-9.1%	INR/USD	77.45	0.0%	4.2%
Kenya	1,747.22	0.8%	0.0%	-3.0%	-8.2%	KES/USD	116.20	0.0%	2.7%
Nigeria	2,060.70	0.2%	0.0%	9.2%	19.6%	NGN/USD	414.50	-0.3%	0.2%
Saudi Arabia	13,149.29	2.4%	2.4%	-4.3%	16.0%	SAR/USD	3.75	0.0%	-0.1%
South Africa	61,991.97	2.2%	0.0%	-5.3%	-7.5%	ZAR/USD	16.18	0.6%	1.4%
Vietnam	1,223.76	-4.4%	0.0%	-13.7%	-20.3%	VND/USD	23,087.50	0.0%	1.3%

MSCI Emerging Markets

MSCI Frontier	548.16	-0.5%	0.0%	-7.0%	-17.7%	Brent Crude (\$)	111.55	3.8%	43.4%
MSCI Frontier 100	1,269.52	-0.7%	0.0%	-7.9%	-17.2%	Gold (\$)	1,808.20	-0.9%	-1.1%
MSCI Emerging	1,004.52	1.7%	0.0%	-6.7%	-18.5%	Copper (\$)	9,159.00	0.8%	-5.8%
MSCI World (USD)	2,701.33	2.3%	0.0%	-3.4%	-16.4%	Coffee (\$)	191.9	-1.6%	-3.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	4.88	9.7%	-9.3%	4.97	International Breweries	8.80	-9.7%	87.2%	102.64
Flour Mills	41.45	9.2%	46.2%	208.38	Stanbic IBTC	33.00	-5.7%	-8.3%	54.80
Seplat Petroleum	1300.00	8.3%	100.0%	273.43	UACN	14.20	-2.1%	47.9%	26.51
Fidelity	3.70	7.2%	45.1%	39.80	FBNH	11.95	-2.0%	3.9%	77.15
Custodian	7.45	4.2%	-4.5%	20.16	P Z Cussons	11.60	-1.7%	90.2%	27.59
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Seplat Petroleum	1300.00	1300.00	0.0%	273.17	Nestle	1400.00	1384.50	1.1%	2.01
Presco	200.00	200.00	0.0%	157.21	Access	9.65	9.50	1.6%	93.80
Okomu Oil	215.00	215.00	0.0%	28.41	Stanbic IBTC	33.00	32.15	2.6%	54.51
Flour Mills	41.45	41.45	0.0%	216.87	Nascon	12.60	11.70	7.7%	8.37
Dangote Cement	300.00	300.00	0.0%	102.28	Sterling	1.52	1.38	10.1%	5.26

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging	26.30	8.1%	101.7%	8.47	Gulf Cement	0.59	-5.1%	-15.7%	0.08
Ras Al Khaimah Ceramics	2.90	7.0%	1.8%	9.09	PALMS SPORTS	11.00	-3.9%	-10.0%	6.57
ABU DHABI PORTS COMPANY	4.90	6.5%	35.4%	34.85	Easylease motorcycle rentals	43.40	-3.6%	49.7%	6.88
Emirates Telecom	31.50	6.3%	-0.6%	69.21	Ghitha Holding P.J.S.C.	87.00	-3.1%	216.4%	25.65
Waha Capital	1.47	5.8%	22.5%	1.03	Response Plus Holding	9.99	-3.0%	3.5%	5.29
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%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Gulf Cement	0.59	0.58	1.7%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Palms Sports PJSC	11.00	10.50	4.8%	0.00
Gulf Medical Projects	2.75	2.75	0.0%	0.00	Du	6.25	5.90	5.9%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Cairo For Investment And RealEstate Development	11.99	2.0%	-11.9%	5.63	Ibsina Pharma	2.29	-4.6%	-22.9%	10.17
Cleopatra Hospital Company	5.49	1.7%	11.6%	12.13	Egyptian Financial Group-Hermes	14.70	-4.4%	-0.7%	236.82
Eastern Company	10.89	1.3%	1.6%	0.65	Credit Agricole Egypt	6.02	-3.5%	-28.5%	5.40
Orascom Development Egypt	4.30	0.5%	-28.3%	0.60	Oriental Weavers	7.47	-3.5%	-26.6%	2.25
Telecom Egypt	16.07	0.1%	-4.2%	1.04	GB AUTO	3.87	-3.3%	-19.1%	8.48
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	16.07	16.07	0.0%	1.04	Commercial International Bank	41.50	41.50	0.0%	35.15
Sidi Kerir Petrochemicals - SIDPEC	7.96	7.96	0.0%	5.00	Credit Agricole Egypt	6.02	6.02	0.0%	5.40
Oriental Weavers	7.47	7.47	0.0%	6.76	Fawry For Banking Technology And Electronic Payment	4.71	4.71	0.0%	10.88
Misr Fertilizers ProductionCompany - Mopco	104.95	104.95	0.0%	16.30	GB AUTO	3.87	3.87	0.0%	4.93
Heliopolis Housing	5.43	5.43	0.0%	8.48	Ibsina Pharma	2.29	2.29	0.0%	6.38

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	404.00	8.5%	-16.3%	28923.142	Hindalco Industries	386.20	-4.8%	-18.8%	6769.62
Sun Pharma Industries	881.95	3.8%	4.3%	4288.01	State Bank Of India	440.50	-4.8%	-4.3%	28360.21
Mahindra & Mahindra	891.50	3.0%	6.5%	4426.26	Jsw Steel	597.55	-4.4%	-8.9%	3440.89
HUL	2189.00	2.4%	-7.3%	4517.22	Icici Bank	676.40	-2.8%	-8.6%	10839.42
Titan Company	2096.15	2.3%	-16.9%	5452.43	Bharti Airtel	685.85	-2.8%	0.3%	8318.69
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	258.00	273.15	-5.5%	3084.36	Axis Bank	636.00	633.40	0.4%	6225.37
Sun Pharma Industries	881.95	967.05	-8.8%	4288.01	Hdfc Bank	1292.50	1287.00	0.4%	10912.27
Mahindra & Mahindra	891.50	979.00	-8.9%	4426.26	Wipro	468.80	462.15	1.4%	3961.16
UPL	780.50	864.70	-9.7%	2412.67	Bharat Petroleum	336.25	331.10	1.6%	770.63
Bharti Airtel	685.85	781.80	-12.3%	8318.69	Nestle India Limited	16380.90	16126.75	1.6%	910.76

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	3.59	5.3%	-13.3%	0.09	Safaricom Plc	30.20	-5.2%	-20.4%	79.74
Diamond Trust Bank Limited	53.75	3.9%	-9.7%	0.09	Absa Bank Kenya	9.70	-2.4%	-18.1%	2.26
Kenya Power & Lighting Limited	1.46	3.5%	-16.6%	0.42	Kengen Limited	3.55	-0.8%	-15.3%	0.30
Kenya Reinsurance Corporation Ltd	2.22	3.3%	-3.5%	0.01	Stanbic Holdings	103.25	-0.7%	18.3%	0.03
Nairobi Securities Exchange Plc	8.38	2.9%	4.8%	0.04	Total Kenya Ltd	23.05	-0.6%	-7.8%	0.15
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	103.25	106.00	-2.6%	0.03	Safaricom Plc	30.20	30.00	0.7%	79.74
Bamburi Cement Limited	37.00	40.00	-7.5%	0.65	Centum Investment Company Plc	11.60	11.50	0.9%	5.81
NCBA Group Plc	26.50	29.00	-8.6%	10.91	Kengen Limited	3.55	3.49	1.7%	0.30
The Cooperative Bank of Kenya Ltd	12.25	14.00	-12.5%	0.82	East African Breweries Limited	141.50	139.00	1.8%	2.04
Standard Chartered Bank Kenya Ltd	124.75	148.75	-16.1%	2.82	Standard Chartered Bank Kenya Ltd	124.75	121.00	3.1%	2.82

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.	66.60	9.9%	75.9%	0.17	Al Kathiri Holding	59.50	-4.0%	-14.9%	7.85
Riyad Bank	37.90	7.7%	39.9%	28.37	Gulf Union Alahlia	11.42	-3.6%	-31.0%	4.62
Anaam International Holding Group	77.90	7.3%	-4.7%	48.61	Saudi Enaya Coop Insurance Co.	25.15	-3.3%	-19.1%	9.11
Buruj Cooperative Insurance	24.60	7.0%	11.3%	10.12	Al Hassan Ghazi Ibrahim Shaker Co.	19.00	-2.8%	-14.3%	17.95
Bank Albilad	48.80	6.1%	5.3%	52.43	Wala Cooperative Insurance Co.	16.58	-2.5%	-12.6%	3.76
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.	101.20	101.20	0.0%	134.00	Allied Cooperative Insurance Group	16.30	16.30	0.0%	1.79
Scientific and Medical Equipment House Co.	83.80	83.80	0.0%	26.48	Fawaz Abdulaziz Alhokair Co.	14.04	14.04	0.0%	26.31
Elm Co.	255.00	255.00	0.0%	114.00	Tanmiah Food Co.	75.90	75.90	0.0%	6.52
Almunajem Foods Co.	70.70	70.70	0.0%	20.50	The Mediterranean and Gulf Insurance and Reinsurance Co.	14.54	14.54	0.0%	4.65
Saudi Tadawul Group Holding Co.	203.20	203.20	0.0%	109.81	Wataniya Insurance Co.	18.10	18.10	0.0%	1.47

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum Ltd	18736.00	12.8%	-10.6%	31498.20	Reinet Investments	32285.00	-1.9%	12.9%	16441.14
Impala Platinum Holdings Ltd	19857.00	10.4%	-11.7%	64749.94	Standard Bank Group Ltd	16168.00	-0.5%	15.5%	41601.06
Anglo American Platinum Ltd	164824.00	9.5%	-6.3%	33194.56	Clicks Group Ltd	29420.00	-0.2%	-6.8%	24058.68
Sibanye Stillwater Ltd	4652.00	5.8%	-5.3%	102725.44	Prosus NV	73457.00	-0.2%	-43.9%	130879.95
Sasol Ltd	39550.00	5.8%	52.7%	77200.22					
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)
British American Tobacco PLC	67666.00	70884.00	-4.5%	41648.02	Aspen Pharmacare Holdings Ltd	15770.00	14921.00	5.7%	22302.06
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	SPAR Group Ltd/The	16167.00	15132.00	6.8%	14354.50
MultiChoice Group	13199.00	13973.00	-5.5%	6008.63	Prosus NV	73457.00	67645.00	8.6%	130879.95
Reinet Investments SCA	32285.00	34965.00	-7.7%	16441.14	Sibanye Stillwater	4652.00	4246.00	9.6%	102725.44
Bid Corp Ltd	33022.00	36098.00	-8.5%	37009.54	Mr Price Group Ltd	20603.00	18650.00	10.5%	30891.01

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietjet Aviation	125900.00	0.9%	-1.9%	86606.61	Khang Dien House Trading & Investment	39300.00	-7.0%	-22.9%	59197.59
					BaoViet Holdings	50700.00	-7.0%	-9.5%	157960.92
					Mobile World Inv. Corp	125100.00	-6.9%	-7.9%	343624.68
					Masan Group Corp	96900.00	-6.9%	-32.0%	170699.04
					PetroVietnam Power Corp	11450.00	-6.9%	-34.6%	227818.36
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.	162700.00	181400.00	-10.3%	53951.32	Asia Commercial JS Bank	27500.00	27500.00	0.0%	168921.50
Vietjet Aviation	125900.00	149000.00	-15.5%	86606.61	Military Commercial Bank	24100.00	24100.00	0.0%	388786.02
No Va Land Invest	75000.00	94351.17	-20.5%	286275.00	Sai Gon Thuong Tin Commercial	20450.00	20450.00	0.0%	460885.74
FPT Corp	93600.00	118900.00	-21.3%	384106.32	Techcombank	33800.00	33800.00	0.0%	513871.54
Phu Nhuan Jewelry	97500.00	124000.00	-21.4%	83226.00	Vietnam Prosperity	29000.00	29000.00	0.0%	593537.20

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