

Daily Market Report

17 May 2022

JSE

JSE All-Share increased by 0.82% to close at 69,211.75 points on Monday, as Industrial, Financial and Resource sectors recorded gains.

BRVM

BRVM Composite Index closed at 214.15 points, down by 1.55% on Monday with Ecobank Côte d'Ivoire and Tractafric Motors Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index decreased by 0.29% to close at 52,944.09 points on Monday, as the Industrial, Consumer goods and Banking sectors recorded losses.

EGX

EGX 30 Index decreased by 0.69% to close at 10,461.88 points on Monday, as market shed around LE 5.12 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.43% to close at 952.29 points on Monday.

African Markets

Nigeria: NSE 30 Index decreased by 0.24% and closed at 2,055.69 points on Monday. International Breweries and Lafarge Africa were the top losers.

Egypt: EGX 30 Index decreased by 0.69% to close at 10,461.88 points on Monday, as market shed around LE 5.12 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index moved down by 0.16% and closed at 1,744.37 points on Monday. Nairobi Securities Exchange and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index increased by 0.81% to close at 62,495.81 points on Monday, as Industrial, Financial and Resource sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.82%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 1.55%

NSE
Nigerian Stock Exchange ▼ 0.29%

EGX
Egyptian Stock Exchange ▼ 0.69%

ESG
Casablanca Stock Exchange ▲ 0.43%

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.75
INTERBANK RATES	
OPR	7.83 ▼
Overnight	8.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index was closed on Monday, due to the mourning of the death of His Highness Sheikh Khaifa Bin Zayed Al Nahyan.

Vietnam: VN-30 Index declined by 0.71% to close at 1,215.08 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.10% to close at 814.34 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.78% to close at 12,914.89 points on Monday, as losses in the Financial Services, Hotels & Tourism and Cement sectors led shares lower. MSCI Saudi Arabia fell by 2.10% to close at 1,794.49 points.

India: Nifty 50 Index increased by 0.38% to close at 15,842.30 points on Monday, as gains in the Real Estate, Auto and Power sectors led shares higher. MSCI India advanced by 0.61% to close at 1,849.88 points.

News

Nigeria:

Inflation hits 16.82%, exceeds IMF's 2022 projection
Govt okays N375b export grant
Manufacturing Sector's Marginal Decline in Q1, '22

Kenya:

Equity, IFC in Sh19bn deal to support SMEs
Bill to Boost Kenya's SACCOs Get Cabinet Nod
Bamburi lends parent firm Sh3.5bn at 1.4pc interest

Abu Dhabi:

Agthia Group Achieves Record Quarterly Revenues of AED 1.05 Billion in 1Q22
Julphar records first-quarter profit on higher revenue
UAE private equity deals set for a return to form

Saudi Arabia:

Saudi Arabia on track to hit oil output of over 13mln bpd by 2027 - minister
Saudi EXIM launches its five-year plan to boost non-oil exports
Dur Hospitality's profit up 582% on post-pandemic recovery

Egypt:

Egypt's trade deficit declines 29.4% to \$2.7B in February
Remittances from Egyptian expats record \$3.3B in March: CBE
Egypt's central bank joins Network for Greening Financial System

South Africa:

Data revenue boosts top line growth at MTN
Vodacom weighs bond issue, changes dividend policy to fund growth
Raubex maintains record R17.1bn order book, produces strong results

India:

SBI hikes MCLR, old home loans to get costlier
Paytm's deal to buy non-life co falls through
Eicher Motors Consolidated March 2022 Net Sales at Rs 3,193.32 cr

Vietnam:

Reference exchange rate down 3 VND at week's beginning
Domestic car market maintains sale growth in April
Vietnam-Laos trade ties growing sustainably

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,493.42	0.0%	0.0%	-5.8%	11.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,461.88	-0.7%	-2.0%	-5.3%	-12.2%	EGP/USD	18.27	-0.2%	16.3%
India	15,842.30	0.4%	0.4%	-7.4%	-8.7%	INR/USD	77.45	0.0%	4.2%
Kenya	1,744.37	-0.2%	-0.2%	-3.1%	-8.3%	KES/USD	116.20	0.0%	2.7%
Nigeria	2,055.69	-0.2%	-0.2%	9.0%	19.4%	NGN/USD	416.00	0.4%	0.5%
Saudi Arabia	12,914.89	-1.8%	-0.6%	-6.0%	14.0%	SAR/USD	3.75	0.0%	-0.1%
South Africa	62,495.81	0.8%	0.8%	-4.6%	-6.8%	ZAR/USD	16.22	0.2%	1.6%
Vietnam	1,215.08	-0.7%	-0.7%	-14.3%	-20.9%	VND/USD	23,097.50	0.0%	1.3%

MSCI Emerging Markets

MSCI Frontier	544.66	-0.6%	-0.6%	-7.6%	-18.2%	Brent Crude (\$)	114.24	2.4%	46.9%
MSCI Frontier 100	1,259.67	-0.8%	-0.8%	-8.6%	-17.8%	Gold (\$)	1,814.00	0.3%	-0.8%
MSCI Emerging	1,007.50	0.3%	0.3%	-6.4%	-18.2%	Copper (\$)	9,238.50	0.9%	-5.0%
MSCI World (USD)	2,693.95	-0.3%	-0.3%	-3.6%	-16.6%	Coffee (\$)	189.84	-1.1%	-4.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.40	8.5%	41.4%	118.99	International Breweries	8.00	-9.1%	70.2%	130.24
Cadbury	16.95	6.6%	92.6%	49.14	Lafarge Africa	28.80	-8.3%	21.5%	218.03
Unilever	15.00	6.4%	11.9%	35.64	Wema	3.57	-2.2%	351.9%	8.15
P Z Cussons	12.05	3.9%	97.5%	23.82	Flour Mills	40.75	-1.7%	43.7%	105.97
Nascon	12.85	2.0%	-2.7%	4.81	UBA	7.90	-1.3%	-1.3%	65.51
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	1300.10	1300.10	0.0%	1411.27	Nestle	1400.00	1384.50	1.1%	56.45
P Z Cussons	12.05	12.05	0.0%	24.22	Access	9.70	9.50	2.1%	278.89
Presco	200.00	200.00	0.0%	198.78	Stanbic IBTC	33.00	32.15	2.6%	4.41
Okomu Oil	215.00	215.00	0.0%	166.70	Nascon	12.85	11.70	9.8%	4.81
Dangote Cement	300.00	300.00	0.0%	67.64	Zenith	24.35	22.00	10.7%	116.84

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£)
Egyptian Financial Group-Hermes Holding Company	15.18	3.3%	2.5%	149.39	T M G Holding	7.72	-4.7%	-4.0%	10.08
MM Group For Industry And International Trade	3.30	3.1%	-52.0%	8.88	Orascom Construction PLC	75.56	-4.6%	-0.6%	9.85
Sidi Kerir Petrochemicals - SIDPEC	8.05	1.1%	3.2%	3.35	Orascom Development Egypt	4.11	-4.4%	-31.5%	1.97
Housing & Development Bank	38.00	0.9%	-13.7%	0.68	Misr Fertilizers Production - Mopco	102.72	-2.1%	-52.0%	8.88
Egyptian Kuwaiti Holding	23.34	0.9%	18.8%	24.69	Ibnsina Pharma	2.25	-1.8%	-22.9%	22.84
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	16.10	16.10	0.0%	10.08	Commercial International Bank	40.90	40.90	0.0%	158.44
Sidi Kerir Petrochemicals - SIDPEC	8.05	8.05	0.0%	3.35	Credit Agricole Egypt	5.95	5.95	0.0%	8.73
Oriental Weavers	7.40	7.40	0.0%	2.55	Fawry For Banking Technology And Electronic Payment	4.63	4.63	0.0%	9.26
Misr Fertilizers Production - Mopco	102.72	102.72	0.0%	8.01	GB AUTO	3.84	3.84	0.0%	16.78
Heliopolis Housing	5.37	5.37	0.0%	5.70	Ibnsina Pharma	2.25	2.25	0.0%	8.11

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Eicher Motors	2626.00	8.0%	1.3%	7220.750	Ultratech Cement	6010.00	-3.0%	-20.8%	4144.23
Apollo Hospitals Enterprise Ltd	3697.00	4.2%	-26.4%	2199.16	Shree Cement limited	22005.00	-2.5%	-18.5%	1131.84
UPL	803.60	2.8%	7.6%	2608.44	Asian Paints	3010.60	-1.7%	-11.0%	2214.14
NTPC	148.20	2.8%	19.1%	2386.32	ITC	254.35	-1.6%	16.6%	2094.77
State Bank Of India	456.00	2.6%	-1.0%	12710.90	Divi's Laboratories Limited	4214.00	-1.6%	-9.9%	495.02
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	254.35	273.15	-6.9%	2094.77	Nestle India Limited	16200.75	16126.75	0.5%	852.32
UPL	803.60	864.70	-7.1%	2608.44	Wipro	468.80	462.15	1.4%	1714.97
Mahindra & Mahindra	904.00	979.00	-7.7%	2576.97	Axis Bank	639.45	630.05	1.5%	3948.98
Sun Pharma Industries	884.00	967.05	-8.6%	2429.68	Shree Cement limited	22005.00	21650.00	1.6%	1131.84
NTPC	148.20	166.35	-10.9%	2386.32	Hdfc Bank	1308.00	1285.30	1.8%	6378.32

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Absa Bank Kenya	9.86	1.6%	-16.8%	0.44	Nairobi Securities Exchange Plc	8.00	-4.5%	0.0%	2.23
WPP Scangroup Plc	3.64	1.4%	-12.1%	0.07	Kenya Power & Lighting Limited	1.43	-2.1%	-18.3%	0.35
British American Tobacco Kenya Ltd	428.75	1.4%	-2.9%	0.17	Diamond Trust Bank Limited	52.75	-1.9%	-11.3%	0.51
Nation Media Group	20.35	1.2%	10.3%	0.02	KCB Group Plc	35.40	-1.0%	-22.1%	46.57
Stanbic Holdings	104.00	0.7%	19.2%	0.31	The Cooperative Bank of Kenya Ltd	12.15	-0.8%	-6.2%	2.69
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%	0.31	Safaricom Plc	30.30	30.00	1.0%	383.10
Bamburi Cement Limited	36.95	40.00	-7.6%	2.50	Centum Investment Company Plc	11.65	11.50	1.3%	0.12
NCBA Group Plc	26.50	29.00	-8.6%	6.06	Kengen Limited	3.55	3.49	1.7%	0.26
The Cooperative Bank of Kenya Ltd	12.15	14.00	-13.2%	2.69	East African Breweries Limited	142.50	139.00	2.5%	72.75
Total Kenya Ltd	23.20	27.50	-15.6%	0.00	Diamond Trust Bank Limited	52.75	51.25	2.9%	0.51

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.	73.20	9.9%	93.3%	0.36	United Cooperative Assurance Co.	25.05	-9.9%	-26.2%	9.40
Dr. Sulaiman Al Habib Medical Services Group	213.00	4.7%	32.0%	217.59	Allianz Saudi Fransi Coop Insurance Co.	18.38	-7.2%	-28.9%	6.51
Bupa Arabia for Cooperative Insurance Co.	168.00	3.7%	27.9%	29.26	AXA Cooperative Insurance Co.	30.25	-6.9%	-8.3%	11.99
Elm Co.	262.00	2.8%	57.5%	136.96	Walaa Cooperative Insurance Co.	15.56	-6.2%	-18.0%	9.89
Saudi Tadawul Group Holding Co.	208.60	2.7%	65.8%	262.78	Knowledge Economic City	15.12	-6.1%	-6.4%	18.95
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.	95.90	95.90	0.0%	209.40	Allied Cooperative Insurance Group	16.04	16.04	0.0%	1.80
Scientific and Medical Equipment House Co.	81.00	81.00	0.0%	30.09	Fawaz Abdulaziz Alhokair Co.	13.94	13.94	0.0%	23.69
Elm Co.	262.00	262.00	0.0%	136.96	Tanmiah Food Co.	73.50	73.50	0.0%	5.97
Almunajem Foods Co.	70.50	70.50	0.0%	30.04	The Mediterranean and Gulf Insurance and Reinsurance Co.	13.92	13.92	0.0%	12.94
Saudi Tadawul Group Holding Co.	208.60	208.60	0.0%	262.78	Wataniya Insurance Co.	17.30	17.30	0.0%	2.74

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	9464.00	3.7%	16.6%	32945.77	Northam Platinum	18051.00	-3.7%	-13.8%	29484.23
Anglo American PLC	66890.00	2.9%	3.7%	56461.65	Naspers Ltd	157286.00	-2.0%	-36.4%	125121.48
Sibanye Stillwater Ltd	4772.00	2.6%	-2.8%	53365.12	Vodacom Group Ltd	14390.00	-1.6%	6.9%	27255.85
Investec PLC	9183.00	2.5%	5.9%	15526.97	Anglo American Platinum Ltd	162300.00	-1.5%	-7.7%	31340.45
Nedbank Group Ltd	21274.00	2.3%	21.6%	25788.19	Aspen Pharmacare Holdings Ltd	15642.00	-0.8%	-30.3%	14156.60
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	68557.00	70884.00	-3.3%	52515.96	Aspen Pharmacare Holdings Ltd	15642.00	14921.00	4.8%	14156.60
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	SPAR Group Ltd/The	16136.00	15132.00	6.6%	8239.99
MultiChoice Group	13100.00	13973.00	-6.2%	9766.99	Prosus NV	73718.00	67645.00	9.0%	63913.43
Reinet Investments SCA	32363.00	34965.00	-7.4%	14536.84	Mr Price Group Ltd	20814.00	18650.00	11.6%	24307.48
Bid Corp Ltd	33153.00	36098.00	-8.2%	25780.17	Sibanye Stillwater	4772.00	4246.00	12.4%	53365.12

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	27300.00	5.8%	-47.3%	510013.14	Masan Group Corp	90200.00	-6.9%	-36.7%	94971.58
Vietnam National Petroleum Group	39100.00	4.7%	-27.5%	62485.71	Sai Gon Thuong Tin Commercial	19050.00	-6.8%	-39.5%	670371.41
Vincom Retail	26250.00	3.8%	-12.8%	122052.00	BaoViet Holdings	47900.00	-5.5%	-14.5%	81453.95
Tien Phong Commercial Joint Stock Bank	31000.00	3.3%	-24.5%	75088.20	Petrovietnam Gas	95000.00	-5.0%	-1.2%	90810.50
Vietnam JSC Bank	24550.00	2.7%	-27.6%	128234.47	Techcombank	32600.00	-3.6%	-34.8%	381080.96
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.	157800.00	181400.00	-13.0%	15732.66	Sai Gon Thuong Tin Commercial	19050.00	19050.00	0.0%	670371.41
Vietjet Aviation	126000.00	149000.00	-15.4%	78082.20	Techcombank	32600.00	32600.00	0.0%	381080.96
No Va Land Invest	75000.00	94351.17	-20.5%	163005.00	Vietnam Prosperity	29000.00	29000.00	0.0%	355766.20
Phu Nhuan Jewelry	98000.00	124000.00	-21.0%	31134.60	Vinamilk	65800.00	65700.00	0.2%	130139.24
FPT Corp	93200.00	118900.00	-21.6%	162251.88	Asia Commercial JS Bank	27600.00	27500.00	0.4%	141797.76

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