

Daily Market Report

19 May 2022

JSE

JSE All-Share declined by 0.88% to close at 69,083.44 points on Wednesday, as Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 208.79 points, down by 0.69% on Wednesday with CFAO Motors Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index inched down 0.07% to close at 52,721.34 points on Wednesday, as the Industrial sector recorded losses.

EGX

EGX 30 Index increased by 0.27% to close at 10,467.63 points on Wednesday, as market gained LE 1.26 billion to market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index was down by 0.12% to close at 951.87 points on Wednesday.

African Markets

Nigeria: NSE 30 Index decreased by 0.22% and closed at 2,042.63 points on Wednesday. FBNH and Lafarge Africa were the top losers.

Egypt: EGX 30 Index increased by 0.27% to close at 10,467.63 points on Wednesday, as market gained LE 1.26 billion to market cap, amid Egyptian purchases.

Kenya: NSE 20 Index dropped by 1.45% and closed at 1,711.83 points on Wednesday. WPP Scangroup and Diamond Trust Bank were the top losers.

South Africa: JSE Top 40 Index decreased by 0.84% to close at 62,494.43 points on Wednesday, as Industrial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 0.88%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.69%

NSE

Nigerian Stock Exchange ▼ 0.07%

EGX

Egyptian Stock Exchange ▲ 0.27%

ESG

Casablanca Stock Exchange ▼ 0.12%

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.62
INTERBANK RATES	
OPR	12.00 ▲
Overnight	12.38 ▲

Other Emerging Markets

Abu Dhabi: ADX Index rose by 1.41% to close at 9,907.77 points on Wednesday, as gains in Consumer Discretionary, Energy, Financials, Industrials, and Real Estate sectors led shares higher. MSCI UAE decreased by 0.49% to close at 483.27 points.

Vietnam: VN-30 Index increased by 0.54% to close at 1,286.41 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased 0.48% to close at 849.12 points.

Saudi Arabia: Tadawul All Share Index climbed 0.19% to close at 12,713.38 points on Wednesday, as gains in the Media & Publishing, Financial Services and Industrial Investment sectors led shares higher. MSCI Saudi Arabia increased by 0.31% to close at 1,767.27 points.

India: Nifty 50 Index was down by 0.12% to close at 16,240.30 points on Wednesday, as losses in the Real Estate, Public Sector Undertakings and Oil & Gas sectors pushed shares lower. MSCI India slipped by 0.04% to close at 1,899.97 points.

News

Nigeria:

Total Energies to sell 10% stake in NNPC, SPDC JV
CBN issues open banking guidelines to boost competition
Seplat's Shareholders Approve \$0.10 Dividend

Kenya:

Private sector lending rises fastest in five years
Public Debt in Kenya Soars to KSh 8.4 trillion
C&G diversification pays off with 36pc profits jump

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Abu Dhabi:

Adnoc launches listing process of Borouge on Abu Dhabi Securities
Abu Dhabi's Anghami records 23% jump in Q1 revenue as it strives to cut losses
ADDED, SAP sign MoU to accelerate digital transformation in Abu Dhabi

Saudi Arabia:

Saudi developer Dar Alarkan sees 675% profit spike in Q1 on higher sales
Saudi Chemanol profits zoom 244% to record highest-ever quarterly gain
Saudi Arabia's PIF Adds to Games Push With 5% Nintendo Stake

Egypt:

Egypt's national exports make great leap, record \$1.197 bln increase
Shell subsidiary acquires ExxonMobil's offshore concession in Egypt
Egyptian pound devaluation boosted dollar revenues by 30%: CBE

South Africa:

CPI: Inflation steady as big interest-rate hike looms
Sanral cancels R17.47bn in adjudicated tenders
Shoprite establishes a B-BBEE employee trust worth R8.9bn

India:

Online Gaming, Casino, Horse Racing To Soon Attract 28% Gst
S&P cuts FY23 India growth forecast to 7.3%
Alibaba, Antfin sell entire 43% stake in Paytm Mall for Rs 42 crore

Vietnam:

Vietnam steel price drops in May
Livestock companies profit hit by rising animal feed prices
Reference exchange rate up 2 VND

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,907.77	1.4%	4.4%	-1.7%	16.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,467.63	0.3%	-2.0%	-5.3%	-12.1%	EGP/USD	18.28	0.0%	16.4%
India	16,240.30	-0.1%	2.9%	-5.0%	-6.4%	INR/USD	77.58	0.0%	4.4%
Kenya	1,711.83	-1.5%	-2.0%	-4.9%	-10.0%	KES/USD	116.35	0.0%	2.8%
Nigeria	2,042.63	-0.2%	-0.9%	8.3%	18.6%	NGN/USD	416.44	0.3%	0.7%
Saudi Arabia	12,713.38	0.2%	-0.9%	-7.4%	12.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	62,494.43	-0.8%	0.8%	-4.6%	-6.8%	ZAR/USD	15.98	0.2%	0.1%
Vietnam	1,286.41	0.5%	5.1%	-9.2%	-16.2%	VND/USD	23,141.00	0.1%	1.5%

MSCI Emerging Markets

MSCI Frontier	551.35	-0.3%	0.6%	-6.5%	-17.2%	Brent Crude (\$)	109.11	-2.5%	40.3%
MSCI Frontier 100	1,279.86	-0.2%	0.8%	-7.2%	-16.5%	Gold (\$)	1,822.40	0.2%	-0.3%
MSCI Emerging	1,033.19	0.2%	2.9%	-4.0%	-16.1%	Copper (\$)	9,235.00	-1.4%	-5.0%
MSCI World (USD)	2,665.06	-3.0%	-1.3%	-4.7%	-17.5%	Coffee (\$)	200.72	1.2%	1.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	5.36	9.8%	-0.4%	6.47	Wema	3.28	-7.6%	315.2%	1.10
Axamansard	2.30	4.5%	3.1%	1.30	Transnational Corporation	1.33	-6.3%	34.3%	57.86
Unilever	15.00	2.7%	11.9%	75.82	FBNH	11.95	-3.2%	3.9%	1897.13
P Z Cussons	13.50	1.9%	121.3%	52.90	Lafarge Africa	28.30	-2.4%	19.4%	158.86
Fidelity	3.65	1.4%	43.1%	27.63	Access	9.70	-1.0%	6.6%	135.91
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%	631.78	Nestle	1401.40	1384.50	1.2%	12.12
Presco	200.00	200.00	0.0%	347.27	Access	9.70	9.50	2.1%	133.80
Okomu Oil	215.00	215.00	0.0%	288.60	Stanbic IBTC	33.00	32.15	2.6%	5.89
Julius Berger	30.50	30.50	0.0%	28.97	Nascon	12.85	11.70	9.8%	1.65
Dangote Cement	300.00	300.00	0.0%	48.17	Zenith	24.40	22.00	10.9%	84.44

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
International Holding	268.50	7.0%	76.6%	371.78	Ras Al Khaimah Poultry	2.02	-9.8%	-13.3%	0.09
Sharjah Cement	0.66	6.9%	-14.6%	0.07	Waha Capital	1.51	-3.8%	25.8%	2.66
AL KHALEEL INVESTMENT	1.34	6.4%	16.5%	0.00	Gulf Cement	0.57	-3.6%	-18.7%	0.11
Easylease motorcycle rentals	52.00	6.3%	79.3%	7.07	Arkan Building Materials Company	1.31	-3.0%	-7.7%	11.93
Abu Dhabi Islamic Bank	8.25	5.1%	20.1%	30.19	National Bank of Ras Al Khaimah	4.80	-2.8%	6.7%	0.00
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	National Bank of Fujairah	4.99	4.98	0.2%	0.00
Insurance House	0.87	0.87	0.0%	0.00	Gulf Pharmaceutical Ind.	1.24	1.22	1.6%	0.55
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	6.20	5.90	5.1%	10.65
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Cement	0.57	0.54	5.4%	0.11
Sharjah Insurance	1.38	1.38	0.0%	0.00	Insurance House	0.87	0.81	7.7%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ibsina Pharma	2.25	3.2%	-44.7%	10.15	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.19	-1.8%	-8.8%	0.48
Orascom Development Egypt	4.19	2.0%	-30.2%	0.84	Fawry For Banking Tech & E-Payment	4.47	-1.8%	-65.1%	18.63
MM Group For Industry AndInternational Trade	3.34	1.5%	-51.5%	15.08	ELSWEDY ELECTRIC	7.36	-1.5%	-25.1%	15.62
Commercial International Bank	40.91	1.5%	-22.8%	89.81	Abou Kir Fertilizers	27.20	-1.1%	-19.7%	15.15
Telecom Egypt	16.40	1.2%	-2.2%	21.61	Heliopolis Housing	5.35	-0.9%	-14.7%	0.43
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	16.40	16.40	0.0%	21.61	Commercial International Bank	40.91	40.91	0.0%	89.81
Sidi Kerir Petrochemicals	8.04	8.04	0.0%	2.66	Credit Agricole	6.16	6.16	0.0%	2.19
Oriental Weavers	7.30	7.30	0.0%	1.90	Fawry For Banking Tech & E-Payment	4.47	4.47	0.0%	18.63
Misr Fertilizers ProductionCompany - Mopco	102.85	102.85	0.0%	11.64	GB AUTO	3.78	3.78	0.0%	1.91
Heliopolis Housing	5.35	5.35	0.0%	5.22	Ibsina Pharma	2.25	2.25	0.0%	10.15

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Consumer products Ltd.	757.00	3.1%	1.8%	2059.557	Power Grid Corp Of India	227.85	-4.5%	11.5%	3321.33
HUL	2291.00	2.1%	-2.9%	4864.40	Bharat Petroleum	331.40	-3.2%	-14.0%	2578.90
Ultratech Cement	6232.00	2.0%	-17.9%	2309.92	Tech Mahindra	1171.45	-2.2%	-34.6%	6309.78
Shree Cement limited	22476.90	2.0%	-16.7%	1280.37	Apollo Hospitals Enterprise Ltd	3739.10	-1.9%	-25.6%	1610.68
Adani Ports And Sez.	758.85	1.9%	3.9%	6838.99	State Bank Of India	458.25	-1.9%	-0.5%	7244.97
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
UPL	822.00	864.70	-4.9%	1466.59	Bharat Petroleum	331.40	331.00	0.1%	2578.90
Mahindra & Mahindra	913.10	979.00	-6.7%	2929.11	Nestle India Limited	16330.00	16126.75	1.3%	1567.87
Sun Pharma Industries	900.00	967.05	-6.9%	2596.90	Hdfc Bank	1315.85	1285.30	2.4%	10394.62
Power Grid Corp Of India	227.85	248.35	-8.3%	3321.33	Shree Cement limited	22476.90	21650.00	3.8%	1280.37
Eicher Motors	2700.05	2994.00	-9.8%	3190.62	Wipro	481.80	462.15	4.3%	3752.63

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	26.60	1.9%	5.6%	5.18	WPP Scangroup Plc	3.44	-6.0%	-16.9%	0.18
British American Tobacco Kenya Ltd	420.00	0.8%	-4.9%	0.21	Diamond Trust Bank Limited	50.00	-5.7%	-16.0%	1.05
					Kenya Reinsurance Corporation Ltd	2.05	-4.7%	-10.9%	0.35
					Safaricom Plc	29.45	-3.3%	-22.4%	203.18
					Nation Media Group	19.90	-2.5%	7.9%	0.20
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%	1.96	Diamond Trust Bank Limited	50.00	50.00	0.0%	1.05
Bamburi Cement Limited	36.80	40.00	-8.0%	1.00	East African Breweries Limited	140.00	139.00	0.7%	28.66
NCBA Group Plc	26.60	29.00	-8.3%	5.18	Kengen Limited	3.51	3.45	1.7%	1.14
The Cooperative Bank of Kenya Ltd	12.00	14.00	-14.3%	4.28	Kenya Reinsurance Corporation Ltd	2.05	2.00	2.5%	0.35
Standard Chartered Bank Kenya Ltd	124.25	148.75	-16.5%	4.19	Standard Chartered Bank Kenya Ltd	124.25	121.00	2.7%	4.19

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Red Sea International Co.	17.16	10.0%	-18.8%	8.00	Al Hassan Ghazi Ibrahim Shaker Co.	22.36	-9.9%	0.9%	46.36
Anaam International Holding Group	35.85	10.0%	-56.1%	0.64	Saudi Electricity Co.	24.72	-7.8%	3.1%	178.91
Saudi Industrial Export Co.	88.50	9.9%	133.7%	1.10	Arabia Insurance Cooperative Co.	28.50	-6.3%	-27.9%	3.23
Saudi British Bank	42.35	5.9%	28.3%	92.76	Amara Cooperative Insurance Co.	29.00	-4.8%	-15.7%	44.89
Banque Saudi Fransi	49.80	5.8%	5.4%	44.50	Rabigh Refining and Petrochemical Co.	26.55	-4.5%	28.3%	87.29
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.	94.00	94.00	0.0%	93.14	Allied Cooperative Insurance Group	15.98	15.98	0.0%	1.47
Scientific and Medical Equipment House Co.	81.10	81.10	0.0%	13.71	Fawaz Abdulaziz Alhokair Co.	13.62	13.62	0.0%	9.95
Elm Co.	270.00	270.00	0.0%	154.10	National Shipping Co of Saudi Arabia	27.50	27.50	0.0%	13.90
Almunajem Foods Co.	71.80	71.80	0.0%	24.23	Tanmiah Food Co.	74.40	74.40	0.0%	3.73
Saudi Tadawul Group Holding Co.	213.60	213.60	0.0%	78.25	The Company for Coop Insurance	62.00	62.00	0.0%	21.91

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Standard Bank Group Ltd	16609.00	1.7%	18.6%	57416.30	Naspers Ltd	159800.00	-4.8%	-35.4%	223957.94
FirstRand Ltd	6886.00	1.5%	13.3%	76769.11	Exxaro Resources	20552.00	-4.2%	34.4%	24111.28
Absa Group Ltd	16968.00	1.2%	11.2%	52476.87	Shoprite Holdings	21088.00	-3.2%	1.0%	45696.37
MTN Group	16939.00	1.1%	-0.8%	53642.65	Prosus NV	75625.00	-3.0%	-42.3%	117211.72
Capitec Bank Holdings Ltd	218122.00	1.0%	7.7%	64853.12	Impala Platinum Holdings Ltd	19399.00	-2.6%	-13.8%	45379.69
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)
Sasol Ltd	39434.00	40798.00	-3.3%	47300.81	SPAR Group Ltd/The	15687.00	15132.00	3.7%	16324.79
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Aspen Pharmacare Holdings Ltd	15708.00	14921.00	5.3%	19234.65
Glencore PLC	9856.00	10360.00	-4.9%	66127.04	Mr Price Group Ltd	20262.00	18650.00	8.6%	17710.61
MultiChoice Group	13202.00	13973.00	-5.5%	11840.08	NEPI Rockcastle PLC	9472.00	8605.00	10.1%	10340.94
Reinet Investments SCA	32551.00	34965.00	-6.9%	13347.54	Woolworths Holdings Ltd	5413.00	4903.00	10.4%	20910.48

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	103200.00	6.9%	-27.6%	133293.12	Tien Phong Comm. Joint Stock Bank	32200.00	-2.4%	-21.6%	127190.00
Sai Gon Thuong Tin Commercial	21750.00	6.9%	-31.0%	589438.05	Saigon Beer Alcohol Beverage Corp.	161500.00	-2.4%	9.3%	25097.10
Petrovietnam Gas	105000.00	4.1%	9.1%	95539.50	Phat Dat Real Estate Development Corp	55800.00	-2.1%	-20.1%	142641.54
Techcombank	36050.00	3.4%	-27.9%	313249.27	FPT Corp	97700.00	-2.0%	5.1%	188990.88
PetroVietnam Power Corp	12650.00	2.0%	-27.7%	142020.29	Vietjet Aviation	125700.00	-1.8%	-2.0%	83075.13
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.	161500.00	181400.00	-11.0%	25097.10	Vietcombank	75400.00	72386.80	4.2%	66427.40
Vietjet Aviation	125700.00	149000.00	-15.6%	83075.13	Asia Commercial JS Bank	28950.00	27500.00	5.3%	101935.85
No Va Land Invest	78300.00	94351.17	-17.0%	219795.93	Vietnam Rubber Group JSC	38200.00	35750.00	6.9%	613996.24
Phu Nhuan Jewelry	102100.00	124000.00	-17.7%	59095.48	Hoa Phat Group JSC	38200.00	35750.00	6.9%	613996.24
FPT Corp	97700.00	118900.00	-17.8%	188990.88	Vietnam Prosperity	30950.00	28950.00	6.9%	367599.34

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