

# Daily Market Report

## 20 May 2022

### JSE

JSE All-Share dropped by 1.21% to close at 68,245.81 points on Thursday, as Industrial, Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 207.72 points, down by 0.51% on Thursday with Bollere Transport & Logistics and Bank of Africa - Mali being the top losers.

### NSE

NSE All-Share Index advanced by 1.05% to close at 53,275.49 points on Thursday, as the Industrial sector recorded gains.

### EGX

EGX 30 Index increased by 0.79% to close at 10,549.97 points on Thursday, as the market added around LE 1.26 billion to market cap, amid Egyptian purchases.

### ESG

Casablanca ESG 10 Index increased by 0.27% to close at 954.44 points on Thursday.

### Capital Markets

**JSE**  
Johannesburg Stock Exchange ▼ 1.21%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▼ 0.51%

**NSE**  
Nigerian Stock Exchange ▲ 1.05%

**EGX**  
Egyptian Stock Exchange ▲ 0.79%

**ESG**  
Casablanca Stock Exchange ▲ 0.27%

### African Markets

**Nigeria:** NSE 30 Index rose by 1.13% and closed at 2,065.62 points on Thursday. MTNN and Stanbic IBTC were the top gainers.

**Egypt:** EGX 30 Index increased by 0.79% to close at 10,549.97 points on Thursday, as the market added around LE 1.26 billion to market cap, amid Egyptian purchases.

**Kenya:** NSE 20 Index decreased by 0.64% and closed at 1,700.88 points on Thursday. Centum Investment Company and Safaricom were the top losers.

**South Africa:** JSE Top 40 Index dropped by 1.23% to close at 61,725.52 points on Thursday, as Industrial, Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.62
<b>INTERBANK RATES</b>	
OPR	12.50 ▲
Overnight	12.50 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.62% to close at 9,846.11 points on Thursday, as losses in Consumer Discretionary, Energy, Financials, Industrials, Health Care and Real Estate sectors pushed shares lower. MSCI UAE declined by 1.07% to close at 478.11 points.

**Vietnam:** VN-30 Index decreased by 0.22% to close at 1,283.55 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam edged up by 0.09% to close at 849.95 points.

**Saudi Arabia:** Tadawul All Share Index fell by 2.24% to close at 12,427.96 points on Thursday, as losses in the Energy & Utilities, Transport and Insurance sectors pushed shares lower. MSCI Saudi Arabia fell by 2.22% to close at 1,728.12 points.

**India:** Nifty 50 Index declined sharply by 2.65% to close at 15,809.40 points on Thursday, as losses in the IT, Technology and Metals sectors pushed shares lower. MSCI India tanked by 2.90% to close at 1844.94 points.

### News

#### Nigeria:

Telcos N208bn 4G investment to boost internet speed - NCC  
World Bank to fund \$30bn projects in Nigeria, others  
FG approves N169.72bn private sector investments in roads

#### Kenya:

Private Sector Lending Grows to a 5 year High of 10.8%-CBK  
Equity Group invests Sh400m in insurance division  
Kenya's debt repayments to China shoot to Sh73.5 billion

#### Abu Dhabi:

ADNOC announces three new oil discoveries  
Abu Dhabi firm to stack Dh9.2b in US-focussed VC fund  
UAE tourism sector achieves new growth milestone in 1st quarter

#### Saudi Arabia:

Saudi's public debt up in 1Q as new domestic debt exceeds repayment  
Amwaj International sets offering price as it joins Saudi's IPO boom  
PetroRabigh's rights to raise share capital steeply to \$4.45bln

#### Egypt:

Egypt's central bank raises interest rates 200bps during May  
NBE, Banque Misr garner over LE 679B from 18% saving certificates  
85 projects worth \$11.9B underway on climate change adaptation

#### South Africa:

Sarb hikes repo rate by 50bps  
Sarb eyes digital rand to cut cross-border payment costs  
Investec posts 91% rise in annual profit

#### India:

Maruti Udyog plans to invest over Rs 20,000 cr in Haryana  
Government in talks with Russia over cut-price oil deal: HPCL  
India asks regulator to allow utilities to import up to 30% of coal needs

#### Vietnam:

Vietnamese banks expected to get better credit ratings  
MoIT stops anti-dumping duties on galvanised steel from S. Korea & China  
Reference exchange rate up 3 VND on May 20

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,846.11	-0.6%	3.7%	-2.3%	16.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,549.97	0.8%	-1.2%	-4.5%	-11.4%	EGP/USD	18.28	0.0%	16.3%
India	15,809.40	-2.7%	0.2%	-7.6%	-8.9%	INR/USD	77.73	0.2%	4.6%
Kenya	1,700.88	-0.6%	-2.7%	-5.5%	-10.6%	KES/USD	116.40	0.0%	2.9%
Nigeria	2,065.62	1.1%	0.2%	9.5%	19.9%	NGN/USD	415.00	-0.3%	0.3%
Saudi Arabia	12,427.96	-2.2%	-3.2%	-9.5%	9.7%	SAR/USD	3.75	0.0%	-0.1%
South Africa	61,725.52	-1.2%	-0.4%	-5.7%	-7.9%	ZAR/USD	15.86	-0.8%	-0.7%
Vietnam	1,283.55	-0.2%	4.9%	-9.4%	-16.4%	VND/USD	23,150.00	0.0%	1.6%

## MSCI Emerging Markets

MSCI Frontier	548.64	-0.5%	0.1%	-6.9%	-17.6%	Brent Crude (\$)	112.04	2.7%	44.0%
MSCI Frontier 100	1,272.90	-0.5%	0.3%	-7.7%	-17.0%	Gold (\$)	1,847.80	1.4%	1.0%
MSCI Emerging	1,014.89	-1.8%	1.0%	-5.7%	-17.6%	Copper (\$)	9,415.50	2.0%	-3.1%
MSCI World (USD)	2,665.06	0.0%	-1.3%	-4.7%	-17.5%	Coffee (\$)	193.49	-3.6%	-2.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	5.89	9.9%	9.5%	5.77	Transnational Corporation	1.24	-6.8%	25.3%	61.43
MTNN	270.00	5.7%	48.4%	5494.94	Fidelity	3.47	-4.9%	36.1%	24.76
Stanbic IBTC	34.50	4.5%	-4.2%	59.77	Ecobank	11.90	-4.8%	42.5%	12.18
Access	9.90	2.1%	8.8%	116.51	Axamansard	2.20	-4.3%	-1.3%	10.72
Lafarge Africa	28.75	1.6%	21.3%	50.47	Cap	21.00	-4.1%	8.0%	50.42
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Presco	200.00	200.00	0.0%	125.46	Nestle	1401.40	1384.50	1.2%	189.55
Okomu Oil	215.00	215.00	0.0%	18.52	Access	9.90	9.50	4.2%	117.97
MTNN	270.00	270.00	0.0%	5562.53	Stanbic IBTC	34.50	32.15	7.3%	59.77
Julius Berger	30.50	30.50	0.0%	23.48	Nascon	12.85	11.70	9.8%	0.35
Dangote Cement	300.00	300.00	0.0%	26.68	Zenith	24.30	22.00	10.5%	100.29

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.52	13.0%	-11.1%	0.01	Abu Dhabi National Takaful	5.40	-9.1%	-12.3%	0.01
ARAM GROUP	2.70	2.7%	-12.9%	0.01	PALMS SPORTS	11.18	-6.1%	-8.5%	5.47
International Holding	272.40	1.5%	79.2%	369.96	Easylease motorcycle rentals	49.10	-5.6%	69.3%	5.68
Ooredoo	7.10	1.4%	9.2%	0.35	Abu Dhabi National for Building Materials	0.20	-4.9%	-21.7%	0.02
Emirates Driving Co.	20.50	1.2%	-2.8%	0.08	Abu Dhabi Commercial Bank	9.64	-4.7%	13.0%	52.07
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.	1.22	1.20	1.7%	0.51
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Gulf Cement	0.55	0.54	2.4%	0.16
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Du	6.10	5.90	3.4%	4.62
Sharjah Insurance	1.38	1.38	0.0%	0.00	Palms Sports PJSC	11.18	10.50	6.5%	5.37

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Commercial International Bank	42.10	2.9%	-20.6%	55.87	MM Group For Industry & International Trade	3.23	-3.3%	-53.1%	8.88
Orascom Construction PLC	77.50	2.9%	2.0%	6.36	GB AUTO	3.70	-2.1%	-27.5%	5.04
Egyptian Kuwaiti Holding-EGP	24.40	2.9%	24.2%	38.53	Alexandria Mineral Oils Company	3.81	-2.1%	4.1%	10.57
Cairo For Investment And Real Estate Development	12.30	2.6%	-9.6%	5.07	Sidi Kerir Petrochemicals	7.88	-2.0%	-12.0%	38.16
Misr Fertilizers Production Company - Mopco	104.00	1.1%	6.7%	22.13	Oрасcom Development Egypt	4.11	-1.9%	-17.0%	4.30
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	16.25	16.25	0.0%	14.57	Commercial International Bank	42.10	42.10	0.0%	55.87
Sidi Kerir Petrochemicals	7.88	7.88	0.0%	4.37	Credit Agricole	6.09	6.09	0.0%	3.01
Oriental Weavers	7.21	7.21	0.0%	4.30	Fawry For Banking Technology And Electronic Payment	4.40	4.40	0.0%	33.20
Misr Fertilizers Production Company - Mopco	104.00	104.00	0.0%	22.13	GB AUTO	3.70	3.70	0.0%	5.04
Heliopolis Housing	5.30	5.30	0.0%	9.66	Ibnsina Pharma	2.27	2.27	0.0%	5.11

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ITC	275.75	3.4%	26.5%	21484.497	Hcl Technologies	1011.40	-5.8%	-23.3%	4841.58
Dr Reddys Lab	3942.25	0.9%	-19.7%	7183.82	Wipro	453.45	-5.8%	-36.6%	5246.14
Power Grid Corp Of India	228.75	0.4%	11.9%	2539.02	Infosys	1431.00	-5.2%	-24.2%	23807.14
					Tata Consultancy Svs.	3271.90	-5.1%	-12.5%	15323.17
					Tech Mahindra	1113.00	-5.0%	-37.8%	4899.36
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	811.00	864.70	-6.2%	1457.44	Wipro	453.45	450.00	0.8%	5246.14
Power Grid Corp Of India	228.75	248.35	-7.9%	2539.02	Nestle India Limited	16130.00	16000.00	0.8%	1134.15
Sun Pharma Industries	884.95	967.05	-8.5%	2410.86	Hdfc Bank	1290.45	1278.30	1.0%	13208.80
Mahindra & Mahindra	884.50	979.00	-9.7%	2383.89	Bharat Petroleum	327.60	324.00	1.1%	1661.25
NTPC	148.10	166.35	-11.0%	1718.08	Shree Cement	22278.00	21650.00	2.9%	628.30

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.48	5.7%	-15.4%	0.35	Centum Investment Company Plc	10.65	-7.0%	-24.5%	2.14
Diamond Trust Bank Limited	50.50	1.0%	-15.1%	2.62	Safaricom Plc	28.05	-4.8%	-26.1%	107.84
Nairobi Securities Exchange Plc	7.92	0.3%	-1.0%	0.08	Kenya Reinsurance Corporation Ltd	2.01	-2.0%	-12.6%	0.61
Total Kenya Ltd	22.95	0.2%	-8.2%	0.02	Nation Media Group	19.70	-1.0%	6.8%	0.05
Bamburi Cement Limited	36.85	0.1%	-3.0%	1.08	Stanbic Holdings	103.00	-1.0%	18.1%	5.69
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	103.00	106.00	-2.8%	5.69	Kenya Reinsurance Corporation Ltd	2.01	2.00	0.5%	0.61
Bamburi Cement Limited	36.85	40.00	-7.9%	1.08	East African Breweries Limited	140.00	139.00	0.7%	4.44
NCBA Group Plc	26.50	29.00	-8.6%	148.70	Diamond Trust Bank Limited	50.50	50.00	1.0%	2.62
The Cooperative Bank of Kenya Ltd	11.95	14.00	-14.6%	3.21	Kengen Limited	3.49	3.45	1.2%	0.34
Total Kenya Ltd	22.95	27.50	-16.5%	0.02	Centum Investment Company Plc	10.65	10.50	1.4%	2.14

## 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.	97.30	9.9%	156.9%	13.13	Arabia Insurance Cooperative Co.	25.65	-10.0%	-35.1%	5.07
Anaam International Holding Group	39.40	9.9%	-51.8%	1.53	Rabigh Refining and Petrochemical Co.	23.90	-10.0%	15.5%	209.38
National Gas and Industrialization Co.	47.05	6.1%	-13.2%	43.89	Ataa Educational Co.	53.30	-7.1%	-7.9%	16.08
Saudi Real Estate Co.	17.00	5.1%	-16.3%	33.19	Al Hassan Ghazi Ibrahim Shaker Co.	20.78	-7.1%	-6.2%	22.77
SABIC Agri-Nutrients Co	152.20	4.8%	-13.8%	426.32	ACWA POWER Co.	128.80	-6.9%	53.3%	175.49
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)
Scientific and Medical Equipment House Co.	80.00	80.00	0.0%	38.31	Allied Cooperative Insurance Group	15.82	15.82	0.0%	1.39
Elm Co.	262.00	262.00	0.0%	136.96	Fawaz Abdulaziz Alhokair Co.	13.54	13.54	0.0%	9.88
Almunajem Foods Co.	72.30	72.30	0.0%	67.57	National Shipping Co of Saudi Arabia	26.40	26.40	0.0%	19.64
Saudi Tadawul Group Holding Co.	204.60	204.60	0.0%	106.19	Savola Group	36.60	36.60	0.0%	54.89
Development Works Food	267.60	267.60	0.0%	38.62	Tanmiah Food Co.	73.20	73.20	0.0%	3.85

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
AngloGold Ashanti Ltd	27951.00	2.5%	-15.0%	56613.21	Old Mutual Ltd	1204.00	-3.9%	-8.1%	15052.20
Clicks Group Ltd	30050.00	2.3%	-4.8%	45364.95	Exxaro Resources	19764.00	-3.8%	29.3%	25631.44
Gold Fields Ltd	17986.00	1.3%	3.3%	104550.75	SPAR Group Ltd/The	15089.00	-3.8%	-9.7%	14348.27
Discovery Ltd	13888.00	0.6%	-3.3%	19311.07	Mondi PLC	29135.00	-3.8%	-26.3%	18357.29
Prosus NV	75782.00	0.2%	-42.1%	92079.98	Standard Bank Group Ltd	16118.00	-3.0%	15.1%	79575.55
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)
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	SPAR Group Ltd/The	15089.00	15031.00	0.4%	14348.27
Sasol Ltd	38604.00	40798.00	-5.4%	51753.33	Aspen Pharmacare Holdings Ltd	15454.00	14921.00	3.6%	25871.48
Glencore PLC	9739.00	10360.00	-6.0%	28455.59	NEPI Rockcastle PLC	9324.00	8605.00	8.4%	11959.71
MultiChoice Group	12921.00	13973.00	-7.5%	18588.02	Mr Price Group Ltd	20237.00	18650.00	8.5%	12366.30
Capitec Bank Holdings Ltd	217470.00	237590.91	-8.5%	65676.59	Woolworths Holdings Ltd	5325.00	4903.00	8.6%	16055.43

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	110400.00	7.0%	-22.5%	190208.16	Tien Phong Comm. Joint Stock Bank	31150.00	-3.3%	-24.1%	61159.91
Ho Chi Minh City Devp	24300.00	1.3%	-21.2%	75558.42	Phat Dat Real Estate Development Corp	54000.00	-3.2%	-22.7%	139811.40
PetroVietnam Power Corp	12800.00	1.2%	-26.9%	157221.12	Vietnam National Petroleum Group	40500.00	-2.2%	-24.9%	55363.50
Saigon Beer Alcohol Beverage Corp.	162900.00	0.9%	10.3%	22577.94	Vietnam JSC Bank	26100.00	-1.9%	-23.0%	111449.61
Vietcombank	76000.00	0.8%	-3.6%	43760.80	Vinamilk	69000.00	-1.8%	-18.8%	100008.60
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.	162900.00	181400.00	-10.2%	22577.94	Asia Commercial JS Bank	28600.00	27500.00	4.0%	53093.04
Vietjet Aviation	125300.00	149000.00	-15.9%	94852.10	Vietcombank	76000.00	72386.80	5.0%	43760.80
No Va Land Invest	78000.00	94351.17	-17.3%	190983.00	Vietnam Prosperity	30450.00	28950.00	5.2%	279859.86
Petrovietnam Gas	105800.00	128400.00	-17.6%	120252.28	Vinamilk	69000.00	65200.00	5.8%	100008.60
Phu Nhuan Jewelry	102100.00	124000.00	-17.7%	41626.17	Phat Dat Real Estate Development Corp	54000.00	50990.48	5.9%	139811.40

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