

Daily Market Report

23 May 2022

JSE

JSE All-Share declined by 0.98% to close at 67,575.25 points on Friday, as the Industrial sector recorded losses.

BRVM

BRVM Composite Index closed at 207.16 points, down by 0.27% on Friday with Solibra Côte d'Ivoire and Oragroup Togo being the top losers.

NSE

NSE All-Share Index decreased by 0.55% to close at 52,979.96 points on Friday, despite positive performance across all sectors.

EGX

EGX 30 Index declined by 0.83% to close at 10,462.74 points on Sunday, as the market shed around LE 3.72 billion of market cap, amid Arab selling.

ESG

Casablanca ESG 10 Index declined by 0.88% to close at 946.05 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.98%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.27%
NSE Nigerian Stock Exchange	▼ 0.55%
EGX Egyptian Stock Exchange	▼ 0.83%
ESG Casablanca Stock Exchange	▼ 0.88%

African Markets

Nigeria: NSE 30 Index fell by 1.71% and closed at 2,030.37 points on Friday. MTNN and Custodian were the top losers.

Egypt: EGX 30 Index declined by 0.83% to close at 10,462.74 points on Sunday, as the market shed around LE 3.72 billion of market cap, amid Arab selling.

Kenya: NSE 20 Index dropped by 1.20% and closed at 1,680.53 points on Friday. WPP Scangroup and Centum Investment Company were the top losers.

South Africa: JSE Top 40 Index declined by 1.18% to close at 60,999.46 points on Friday, as the Industrial sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.58
INTERBANK RATES	
OPR	12.25 ▼
Overnight	12.50 ↔

Other Emerging Markets

Abu Dhabi: ADX Index rose by 0.90% to close at 9,934.39 points on Friday, as gains in the Consumer Staples, Energy, Financials, Industrials, Health Care, and Real Estate sectors led shares higher. MSCI UAE slipped by 0.04% to close at 477.9 points.

Vietnam: VN-30 Index inched down by 0.08% to close at 1,282.51 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.81% to close at 843.05 points.

Saudi Arabia: Tadawul All Share Index declined by 0.75% to close at 12,334.94 points on Sunday, as losses in the Transport, Energy & Utilities and Insurance sectors led shares lower. MSCI Saudi Arabia decreased by 0.55% to close at 1,718.57 points.

India: Nifty 50 Index surged by 2.89% to close at 16,266.15 points on Friday, as gains in the Real Estate, Metals and Capital Goods sectors led shares higher. MSCI India rose by 2.57% to close at 1,892.31 points.

News

Nigeria:

Forex inflow falls by 37% to \$4.36bn in one month, says CBN
Nigeria loses N2.2tn revenue to crude production delays—Report
Sterling Bank signs MoU with optometrists on funding

Kenya:

British fund plans Sh81bn investments in Kenya
Kenya gets Sh2.5bn for KDF in Somalia
Kenya's debt repayments to China shoot to Sh73.5 bn

Abu Dhabi:

Oil settles higher on improved demand even as recession fears loom
Aggregate Q1 profit of UAE's 10 largest banks climbs 24% amid recovery
EDB in talks with Poland's national development bank to boost collaboration

Saudi Arabia:

Saudi Arabia's Alwaleed sells \$1.5bn stake in Kingdom Holding to PIF
Saudi signals support for Russia's role in Opec+ as sanctions pressure mounts
Saudi Al-Baha Investment board recommends IPO for its 87%-owned unit

Egypt:

Egypt's Sisi approves law to increase state budget by 6 bn Egyptian pounds
Egypt's private sector to sell \$120m-200m in green bonds: Minister
Egypt's Suez Canal revenues to hit \$7bn by end of FY

South Africa:

S&P raises SA's outlook to 'positive' on trade terms, fiscal discipline
CompCom backs Massmart's R1.36bn sale of Cambridge & Rhino to Shoprite
Rand sees weekly gain after lending rate hike

India:

RBI board approves transfer of Rs 30,307 cr as dividend to govt
Entire annual Rs 2.2 lakh crore burden of fuel tax cuts to be borne by Centre
Centre cuts excise duty by Rs 8 on petrol, Rs 6 on diesel

Vietnam:

Large industrial zones set up to attract FDI
Banks under pressure despite positive credit recovery
Reference exchange rate down 28 VND at week's beginning

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,934.39	0.9%	0.0%	-1.5%	17.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,462.74	-0.8%	-0.8%	-5.3%	-12.1%	EGP/USD	18.28	0.0%	16.4%
India	16,266.15	2.9%	0.0%	-4.9%	-6.3%	INR/USD	77.55	-0.2%	4.3%
Kenya	1,680.53	-1.2%	0.0%	-6.7%	-11.7%	KES/USD	116.45	0.0%	2.9%
Nigeria	2,030.37	-1.7%	0.0%	7.6%	17.9%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	12,334.94	-0.7%	-0.7%	-10.2%	8.9%	SAR/USD	3.75	0.0%	-0.1%
South Africa	60,999.46	-1.2%	0.0%	-6.8%	-9.0%	ZAR/USD	15.89	0.2%	-0.5%
Vietnam	1,282.51	-0.1%	0.0%	-9.5%	-16.5%	VND/USD	23,170.00	0.1%	1.7%

MSCI Emerging Markets

MSCI Frontier	546.90	-0.3%	0.0%	-7.2%	-17.8%	Brent Crude (\$)	112.55	0.5%	44.7%
MSCI Frontier 100	1,269.43	-0.3%	0.0%	-7.9%	-17.2%	Gold (\$)	1,848.40	0.03%	1.1%
MSCI Emerging	1,035.31	2.0%	0.0%	-3.8%	-16.0%	Copper (\$)	9,422.00	0.1%	-3.1%
MSCI World (USD)	2,655.91	0.2%	0.0%	-5.0%	-17.8%	Coffee (\$)	194.28	0.41%	-2.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	3.46	5.5%	338.0%	1.98	MTNN	249.00	-7.8%	36.8%	461.52
Airtel Africa	1470.00	5.0%	53.9%	1032.47	Custodian	7.00	-6.7%	-10.3%	24.83
Transnational Corporation	1.30	4.8%	31.3%	27.83	P Z Cussons	13.00	-4.1%	113.1%	4.64
Axamansard	2.26	2.7%	1.3%	2.51	Guaranty	23.70	-0.8%	-8.8%	131.67
International Breweries	8.20	2.5%	74.5%	8.89	Zenith	24.10	-0.8%	-3.6%	168.63
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%	37.86	Nestle	1401.40	1384.50	1.2%	110.93
Okomu Oil	215.00	215.00	0.0%	58.27	Access	9.85	9.50	3.7%	67.76
Julius Berger	30.50	30.50	0.0%	9.82	Stanbic IBTC	34.50	32.15	7.3%	1.70
Dangote Cement	300.00	300.00	0.0%	75.54	Zenith	24.10	22.00	9.5%	168.22
Airtel Africa	1470.00	1470.00	0.0%	1031.87	Nascon	12.85	11.70	9.8%	0.97

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
PALMS SPORTS	12.46	11.5%	2.0%	2.97	Abu Dhabi National Takaful	4.86	-10.0%	-21.1%	0.01
RAK Co. for White Cement & Construction	2.21	7.8%	30.0%	0.18	The National Investor PRJSC	0.45	-10.0%	-30.7%	0.05
Abu Dhabi Commercial Bank	9.92	2.9%	16.3%	31.05	Abu Dhabi National for Building Materials	0.18	-9.7%	-29.3%	0.00
RESPONSE PLUS HOLDING	9.99	2.9%	3.5%	0.94	Ghitha Holding P.J.S.C.	89.55	-2.7%	225.6%	29.78
International Holding	279.90	2.8%	84.1%	345.43	Sudatel Telecom	0.34	-2.6%	-3.7%	0.14
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	Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00
Insurance House	0.87	0.87	0.0%	0.00	National Bank of Fujairah	4.99	4.98	0.2%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	5.99	5.90	1.5%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Cement	0.55	0.54	2.0%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Gulf Pharma Ind.	1.23	1.20	2.5%	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	14.93	0.6%	0.8%	21.61	Orascom Construction PLC	74.37	-4.0%	-2.1%	7.30
Ibnsina Pharma	2.28	0.4%	-44.0%	7.68	Cleopatra Hospital Company	5.32	-3.3%	8.1%	0.32
Credit Agricole Egypt	6.10	0.2%	-27.6%	1.13	Abou Kir Fertilizers	26.34	-2.3%	22.5%	16.18
Citadel Capital - Common Shares	1.28	0.2%	6.0%	2.42	Alexandria Mineral Oils Company	3.73	-2.1%	-9.6%	0.07
Palm Hills Development Company	1.46	0.1%	-26.7%	0.77	Egyptian Kuwaiti Holding-EGP	23.92	-2.0%	-25.6%	5.09
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	16.22	16.22	0.0%	2.58	Commercial International Bank	41.78	41.78	0.0%	18.75
Sidi Kerir Petrochemicals - SIDPEC	7.82	7.82	0.0%	1.27	Credit Agricole Egypt	6.10	6.10	0.0%	1.13
Oriental Weavers	7.19	7.19	0.0%	3.17	Fawry For Banking TechnologyAnd Electronic Payment	4.35	4.35	0.0%	6.98
Misr Fertilizers Production Company - Mopco	102.02	102.02	0.0%	12.59	GB AUTO	3.63	3.63	0.0%	3.14
Heliopolis Housing	5.26	5.26	0.0%	2.70	Ibnsina Pharma	2.28	2.28	0.0%	7.68

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Dr Reddys Lab	4228.00	7.6%	-13.8%	10430.270	Shree Cement limited	22040.00	-0.8%	-18.3%	1119.09
Reliance Industries	2628.85	6.0%	11.0%	25840.76	UPL	808.30	-0.7%	8.2%	1815.49
Adani Ports And Sez.	771.60	5.3%	5.7%	4138.42					
Jsw Steel	630.90	5.1%	-3.8%	3884.68					
Tata Motors	418.00	4.9%	-13.3%	9813.02					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Sun Pharma Industries	915.00	967.05	-5.4%	2620.20	Shree Cement limited	22040.00	21650.00	1.8%	1119.09
UPL	808.30	864.70	-6.5%	1815.49	Wipro	459.80	450.00	2.2%	2918.92
Mahindra & Mahindra	904.90	979.00	-7.6%	3097.48	Bharat Petroleum	333.00	324.00	2.8%	1064.24
Power Grid Corp Of India	229.50	248.35	-7.6%	2607.97	Hdfc Bank	1323.45	1278.30	3.5%	9130.95
Reliance Industries	2628.85	2856.15	-8.0%	25840.76	Nestle India Limited	16769.00	16000.00	4.8%	2557.98

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corporation Ltd	2.05	2.0%	-10.9%	0.04	WPP Scangroup Plc	3.13	-8.5%	-24.4%	0.20
East African Breweries Limited	142.75	2.0%	-13.5%	46.41	Centum Investment Company Plc	10.05	-5.6%	-28.7%	2.74
Stanbic Holdings	104.00	1.0%	19.2%	0.00	The Cooperative Bank of Kenya Ltd	11.60	-2.9%	-10.4%	1.72
KCB Group Plc	35.30	0.9%	-22.3%	49.38	Kenya Power & Lighting Limited	1.44	-2.7%	-17.7%	0.13
Nation Media Group	19.85	0.8%	7.6%	0.02	Kengen Limited	3.42	-2.0%	-18.4%	0.39
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%	0.00	Kengen Limited	3.42	3.40	0.6%	0.39
NCBA Group Plc	26.25	29.00	-9.5%	1.17	Safaricom Plc	27.80	27.50	1.1%	72.17
Bamburi Cement Limited	36.15	40.00	-9.6%	0.44	WPP Scangroup Plc	3.13	3.08	1.6%	0.20
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	6.26	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	6.26
Total Kenya Ltd	22.90	27.50	-16.7%	0.00	Kenya Reinsurance Corporation Ltd	2.05	2.00	2.5%	0.04

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Kingdom Holding Co.	9.99	9.9%	-1.1%	5718.23	Amana Cooperative Insurance Co.	26.10	-10.0%	-24.1%	16.07
Arab Sea Information System Co.	180.80	5.9%	-7.8%	33.75	Buruj Cooperative Insurance Co.	21.42	-10.0%	-3.1%	11.85
Al Gassim Investment Holding Co.	23.24	5.7%	-1.8%	25.33	Saudi Industrial Export Co.	87.60	-10.0%	131.3%	126.67
United Cooperative Assurance Co.	30.85	4.9%	-9.1%	5.17	Maharah Human Resources Co.	68.70	-10.0%	-9.6%	120.18
Lazurde Company for Jewelry	16.94	4.6%	-17.4%	36.85	Salama Cooperative Insurance Co.	11.58	-10.0%	-31.9%	3.98
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%	23.33	Allied Cooperative Insurance Group	15.50	15.50	0.0%	0.85
Elm Co.	255.00	255.00	0.0%	84.88	Fawaz Abdulaziz Alhokair Co.	13.22	13.22	0.0%	6.11
Almunajem Foods Co.	73.50	73.50	0.0%	60.13	National Shipping Company of Saudi Arabia	25.65	25.65	0.0%	23.29
Saudi Tadawul Group Holding Co.	207.00	207.00	0.0%	59.73	Savola Group	36.25	36.25	0.0%	27.30
Development Works Food	262.00	262.00	0.0%	25.16	Tanmiah Food Co.	72.90	72.90	0.0%	5.36

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Exxaro Resources Ltd	20662.00	4.5%	35.2%	36372.54	Cie Financiere Richemont SA	14969.00	-12.9%	-38.0%	246101.98
Investec Ltd	9475.00	3.8%	8.2%	10910.98	Clicks Group Ltd	29197.00	-2.8%	-7.5%	29463.19
Investec PLC	9367.00	3.7%	8.1%	20675.91	Sibanye Stillwater	4615.00	-2.5%	-6.0%	54762.93
Anglo American PLC	69910.00	3.0%	8.4%	107209.71	Woolworths Holdings Ltd	5209.00	-2.2%	0.4%	34534.29
Impala Platinum Holdings Ltd	19433.00	2.9%	-13.6%	84958.98	Gold Fields Ltd	17642.00	-1.9%	1.3%	65623.07
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	68200.00	70884.00	-3.8%	48667.79	SPAR Group Ltd/The	14865.00	14760.00	0.7%	14521.29
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Cie Financiere Richemont SA	14969.00	14810.00	1.1%	246101.98
Glencore PLC	9844.00	10360.00	-5.0%	41159.92	Aspen Pharmacare Holdings Ltd	15835.00	14921.00	6.1%	23710.27
MultiChoice Group	12927.00	13973.00	-7.5%	11442.93	Woolworths Holdings Ltd	5209.00	4903.00	6.2%	34534.29
Investec PLC	9367.00	10346.00	-9.5%	20675.91	Mr Price Group Ltd	20084.00	18650.00	7.7%	19758.10

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phu Nhuan Jewelry	106000.00	3.8%	10.8%	51261.60	Saigon Beer Alcohol Beverage Corp.	156500.00	-3.9%	5.9%	26088.55
Asia Commercial JS Bank	29050.00	1.6%	-15.8%	56240.80	Masan Group Corp	107800.00	-2.4%	-24.4%	100351.02
Military Commercial Bank	27000.00	0.9%	-6.6%	136209.60	Vinamilk	68100.00	-1.3%	-19.9%	88271.22
Tien Phong Commercial Joint Stock Bank	31400.00	0.8%	-23.5%	65808.12	Petrovietnam Gas	104500.00	-1.2%	8.6%	30608.05
Mobile World Inv. Corp	134000.00	0.8%	-1.4%	116472.80	Vietcombank	75300.00	-0.9%	-4.4%	49833.54
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.	156500.00	181400.00	-13.7%	26088.55	Phat Dat Real Estate Development Corp	53800.00	52091.00	3.3%	125542.30
Phu Nhuan Jewelry	106000.00	124000.00	-14.5%	51261.60	Vietcombank	75300.00	72386.80	4.0%	49833.54
Vietjet Aviation	125300.00	149000.00	-15.9%	62938.19	Vinamilk	68100.00	65200.00	4.4%	88271.22
No Va Land Invest	77800.00	94351.17	-17.5%	185311.82	Vietnam Rubber Group JSC	37650.00	35750.00	5.3%	524441.91
Mobile World Inv. Corp	134000.00	162800.00	-17.7%	116472.80	Hoa Phat Group JSC	37650.00	35750.00	5.3%	524441.91

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