

Daily Market Report

25 May 2022

JSE

JSE All-Share declined by 0.99% to close at 67,690.75 points on Tuesday, as the Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 204.99 points, down by 0.62% on Tuesday with Saph Côte d'Ivoire and Filtisac Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index dropped by 1.82% to close at 51,949.64 points on Tuesday, as the Consumer good, Insurance, Industrial, Banking, and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index declined by 0.95% to close at 10,415.54 points on Tuesday, as the market shed around LE 5.7 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index dropped by 1.23% to close at 931.88 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.99%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.62%
NSE Nigerian Stock Exchange	▼ 1.82%
EGX Egyptian Stock Exchange	▼ 0.95%
ESG Casablanca Stock Exchange	▼ 1.23%

African Markets

Nigeria: NSE 30 Index declined sharply by 2.36% and closed at 1,978.27 points on Tuesday. Guinness and MTNN were the top losers.

Egypt: EGX 30 Index declined by 0.95% to close at 10,415.54 points on Tuesday, as the market shed around LE 5.7 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index was down by 0.14% and closed at 1,669.94 points on Tuesday. WPP Scangroup and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index declined by 0.99% to close at 61,176.93 points on Tuesday, as the Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.68
INTERBANK RATES	
OPR	12.33 ↔
Overnight	12.50 ↔

Other Emerging Markets

Abu Dhabi: ADX Index fell by 2.52% to close at 9,472.28 points on Tuesday, as losses in the Consumer Staples, Energy, Financials, Industrials, Telecom, and Basic Materials sectors pushed shares lower. MSCI UAE slumped by 3.0% to close at 448.37 points.

Vietnam: VN-30 Index rose by 1.38% to close at 1,272.71 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.73% to close at 836.15 points.

Saudi Arabia: Tadawul All Share Index increased by 0.53% to close at 12,300.86 points on Tuesday, as gains in the Energy & Utilities, Industrial Investment and Real Estate Development sectors led shares higher. MSCI Saudi Arabia was up by 0.25% to close at 1,704.46 points.

India: Nifty 50 Index decreased by 0.55% to close at 16,125.15 points on Tuesday, as losses in the IT, Power and Technology sectors pushed shares lower. MSCI India declined by 0.78% to close at 1,871.13 points.

News

Nigeria:

CBN raises interest rate to 13%
Oil sector growth dropped by 26% in Q1 – NBS report
FG projects \$289bn local refining in five years

Kenya:

Mobile Money Transactions Hit Ksh 1.82 Trillion in 1Q22-CBK
Individual Income Tax Revenue Rises to Ksh 333.5 Billion
Sasra cuts statutory levy for new sacco after industry talks

Abu Dhabi:

Abu Dhabi energy giants ADNOC & Masdar join BP in new energy partnership
Flydubai and Standard Chartered sign deal for five Boeing aircraft
ADFD finances development projects worth Dhs6.5 billion in Jordan

Saudi Arabia:

Saudi Arabia issued \$3.99 billion riyal-denominated sukuk in May
Saudi to utilise 2022 oil windfall to accelerate economic diversification
Saudi's CMA approves capital raise of Amana, Arabia Insurance

Egypt:

Google drives estimated LE 11.2B to Egyptian economy in 2021: report
MNHD reports EGP 271.5m in gross profit during 1Q22, growing 12.4% YoY
GIZ, FRA cooperate to support growth of SMEs in Egypt

South Africa:

Assets of SA collective investment schemes stay above R3trn threshold
South Africa Union Says Wage Deal Agreed With Anglo Platinum
Dis-Chem on healthy track with strong annuals as it hits R30bn revenue milestone

India:

Aditya Birla Fashion to raise Rs 2,195 crore from GIC
India cuts June domestic coal supply targets to utilities by 11.1%
Tata Cap Growth Fund to invest over Rs 200 cr in Aarthi Scans

Vietnam:

Hanoi strengthens consumption stimulus programmes
Steel prices cool down as input costs drop
Reference exchange rate unchanged on May 25

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,472.28	-2.5%	-4.7%	-6.0%	11.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,415.54	-0.9%	-1.3%	-5.7%	-12.5%	EGP/USD	18.50	0.5%	17.8%
India	16,125.15	-0.6%	-0.9%	-5.7%	-7.1%	INR/USD	77.59	0.1%	4.4%
Kenya	1,669.94	-0.1%	-0.6%	-7.3%	-12.2%	KES/USD	116.60	0.1%	3.0%
Nigeria	1,978.27	-2.4%	-2.6%	4.9%	14.9%	NGN/USD	415.00	-0.2%	0.3%
Saudi Arabia	12,300.86	0.5%	-1.0%	-10.4%	8.6%	SAR/USD	3.75	0.0%	-0.1%
South Africa	61,176.93	-1.0%	0.3%	-6.6%	-8.8%	ZAR/USD	15.71	0.2%	-1.6%
Vietnam	1,272.71	1.4%	-0.8%	-10.2%	-17.1%	VND/USD	23,175.00	0.0%	1.7%

MSCI Emerging Markets

MSCI Frontier	541.32	-0.5%	-1.0%	-8.2%	-18.7%	Brent Crude (\$)	113.56	0.1%	46.0%
MSCI Frontier 100	1,254.06	-0.5%	-1.2%	-9.1%	-18.2%	Gold (\$)	1,871.40	0.9%	2.3%
MSCI Emerging	1,016.99	-1.7%	-1.8%	-5.5%	-17.5%	Copper (\$)	9,453.50	-1.0%	-2.7%
MSCI World (USD)	2,680.46	-0.8%	0.9%	-4.1%	-17.1%	Coffee (\$)	190.48	-1.1%	-4.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.50	2.9%	17.4%	51.81	Guinness	88.20	-10.0%	126.2%	34.37
Cap	21.40	1.9%	10.0%	12.36	Axamansard	2.04	-9.7%	-8.5%	53.34
Stanbic IBTC	34.50	0.3%	-4.2%	37.39	MTNN	230.00	-7.6%	26.4%	577.78
					Transnational Corporation	1.21	-6.9%	22.2%	39.69
					UACN	12.75	-3.4%	32.8%	673.07
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Okomu Oil	215.00	215.00	0.0%	27.14	Nestle	1401.40	1384.50	1.2%	19.03
Julius Berger	30.50	30.50	0.0%	6.80	Access	9.95	9.50	4.7%	602.16
Airtel Africa	1470.00	1470.00	0.0%	39.78	Stanbic IBTC	34.50	32.15	7.3%	37.46
Seplat Petroleum	1300.00	1300.10	0.0%	1133.78	Zenith	24.00	22.00	9.1%	599.69
BUA Cement	74.25	74.50	-0.3%	3.10	Nascon	12.85	11.70	9.8%	1.00

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement	0.57	5.4%	-18.7%	0.01	Fujairah Cement Industries	0.47	-9.6%	-19.7%	0.05
Abu Dhabi National Hotels	3.80	2.7%	0.5%	0.38	National Marine Dredging	25.50	-8.8%	95.6%	2.42
Methaq Takaful Ins.	0.78	2.6%	-3.7%	0.52	PALMS SPORTS	11.04	-8.0%	-9.7%	0.24
Ras Al Khaimah Ceramics	2.81	0.4%	-1.4%	13.35	FERTIGLOBE PLC	4.85	-8.0%	37.8%	90.22
GHITHA HOLDING P.J.S.C.	88.50	0.3%	221.8%	27.19	Abu Dhabi National Ins. Co	5.80	-7.5%	-13.4%	2.38
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%	0.07	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	5.85	5.80	0.9%	2.03
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Pharmaceutical Ind.	1.22	1.20	1.7%	0.95
Sharjah Insurance	1.38	1.38	0.0%	0.00	Sudatel Telecom	0.33	0.32	3.4%	0.02

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.24	3.7%	-6.7%	1.78	Ibnsina Pharma	2.14	-7.0%	-47.4%	27.67
Oriental Weavers	7.23	0.3%	-16.8%	4.25	Palm Hills Dev. Company	1.36	-5.9%	-31.7%	11.50
					Orascom Construction PLC	69.56	-5.1%	-8.5%	9.48
					GB AUTO	3.36	-4.8%	-24.1%	9.37
					Heliopolis Housing	5.09	-3.6%	-14.4%	1.46
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	16.15	16.15	0.0%	13.82	Commercial Int. Bank(Egypt)	42.25	42.25	0.0%	65.59
Sidi Kerir Petrochemicals - SIDPEC	7.83	7.83	0.0%	2.78	Credit Agricole Egypt	6.02	6.02	0.0%	0.59
Oriental Weavers	7.23	7.23	0.0%	4.25	Fawry For Banking Technology And Electronic Payment	4.10	4.10	0.0%	27.88
Misr Fertilizers Production Company - Mopco	102.96	102.96	0.0%	1.47	GB AUTO	3.36	3.36	0.0%	6.64
Heliopolis Housing	5.09	5.09	0.0%	9.37	Ibnsina Pharma	2.14	2.14	0.0%	27.67

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Dr Reddys Lab	4359.00	2.0%	-11.2%	4378.777	Divi's Laboratories Limited	3663.90	-6.0%	-21.7%	18486.45
HDFC	2212.95	1.7%	-14.4%	8320.96	Tech Mahindra	1097.00	-4.0%	-38.7%	4076.11
Kotak Mahindra Bank	1881.00	1.4%	4.7%	6421.02	Grasim Industries	1401.00	-3.9%	-13.6%	2599.88
Power Grid Corp Of India	227.80	1.4%	11.4%	2790.78	HUL	2307.10	-3.1%	-2.2%	7147.96
Hdfc Bank	1320.00	1.2%	-10.8%	8451.35	Hindalco Industries	401.50	-2.8%	-15.6%	5215.18
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	271.00	282.35	-4.0%	4232.62	Shree Cement limited	21585.00	21575.05	0.0%	852.06
Sun Pharma Industries	912.85	967.05	-5.6%	2675.12	Jsw Steel	538.85	537.25	0.3%	4123.07
Power Grid Corp Of India	227.80	248.35	-8.3%	2790.78	Divi's Laboratories Limited	3663.90	3650.00	0.4%	18486.45
UPL	792.80	864.70	-8.3%	1341.86	Tata Steel	1005.50	1001.55	0.4%	12552.73
Reliance Industries	2615.05	2856.15	-8.4%	16353.26	Bharat Petroleum	329.50	324.00	1.7%	975.12

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	108.00	7.7%	23.8%	1071.79	WPP Scangroup Plc	2.86	-3.4%	-30.9%	0.10
NCBA Group Plc	26.45	1.7%	5.0%	19.11	Nairobi Securities Exchange Plc	8.00	-3.1%	0.0%	2.52
Centum Investment Company Plc	10.15	1.5%	-28.0%	1.41	Bamburi Cement Limited	35.35	-2.8%	-7.0%	2.68
KCB Group Plc	35.95	1.1%	-20.9%	51.65	Equity Group Holdings Plc	42.00	-2.4%	-20.4%	41.11
Absa Bank Kenya	9.90	0.8%	-16.5%	2.14	Diamond Trust Bank Limited	49.00	-1.2%	-17.6%	0.00
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	108.00	108.00	0.0%	1071.79	Diamond Trust Bank Limited	49.00	48.50	1.0%	0.00
NCBA Group Plc	26.45	29.00	-8.8%	19.11	WPP Scangroup Plc	2.86	2.82	1.4%	0.10
Bamburi Cement Limited	35.35	40.00	-11.6%	2.68	East African Breweries Limited	141.00	139.00	1.4%	444.64
Standard Chartered Bank Kenya Ltd	124.25	148.75	-16.5%	3.06	Kengen Limited	3.49	3.40	2.6%	0.44
Total Kenya Ltd	22.85	27.50	-16.9%	0.03	Standard Chartered Bank Kenya Ltd	124.25	121.00	2.7%	3.06

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.	105.80	9.9%	179.4%	21.55	Kingdom Holding	10.18	-7.0%	0.8%	57.08
Salama Cooperative Insurance Co.	13.60	9.5%	-20.0%	14.74	Anaam International Holding Group	32.10	-5.6%	-60.7%	28.87
Arabian Shield Cooperative Insurance Co.	18.12	8.5%	-28.4%	21.32	Saudi Research and Marketing Group	230.80	-4.5%	17.6%	10.70
Al Jouf Cement Co.	10.34	6.7%	-5.0%	17.37	Saudi Marketing Co.	24.40	-4.3%	-15.3%	12.64
Almasane Alkobra Mining Co.	92.00	6.6%	12.3%	195.49	Mouwasat Medical Services Co.	208.00	-4.2%	19.7%	31.60
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.	78.30	78.30	0.0%	37.02	Allied Cooperative Insurance Group	15.40	15.40	0.0%	2.69
Elm Co.	243.00	243.00	0.0%	117.85	Fawaz Abdulaziz Alhokair Co.	12.74	12.74	0.0%	10.60
Almunajem Foods Co.	71.30	71.30	0.0%	37.18	National Shipping Co of Saudi Arabia	24.88	24.88	0.0%	13.96
Saudi Tadawul Group Holding Co.	209.00	209.00	0.0%	102.71	Savola Group	35.65	35.65	0.0%	12.05
Development Works Food	259.00	259.00	0.0%	16.76	Tanmiah Food Co.	72.00	72.00	0.0%	4.01

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	10398.00	2.7%	28.1%	62437.72	Naspers Ltd	146018.00	-6.7%	-40.9%	139653.08
Investec PLC	9600.00	1.1%	10.7%	8263.98	Prosus NV	69694.00	-6.0%	-46.8%	74739.36
AngloGold Ashanti Ltd	28212.00	0.8%	-14.2%	27575.54	MTN Group	16304.00	-3.0%	-4.5%	34924.72
Cie Financiere Richemont SA	15143.00	0.7%	-37.3%	64485.07	Bidvest Group	19825.00	-2.6%	4.6%	10922.48
Reinet Investments SCA	31672.00	0.6%	10.7%	3095.24	Mr Price Group Ltd	19812.00	-2.2%	-0.7%	27742.49
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	68404.00	70884.00	-3.5%	30871.14	SPAR Group Ltd/The	14679.00	14591.00	0.6%	12468.53
Sasol Ltd	39102.00	40798.00	-4.2%	41923.13	Cie Financiere Richemont SA	15143.00	14734.00	2.8%	64485.07
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Prosus NV	69694.00	67645.00	3.0%	74739.36
Investec PLC	9600.00	10346.00	-7.2%	8263.98	Aspen Pharmacare Holdings Ltd	15622.00	14921.00	4.7%	12177.41
Investec Ltd	9701.00	10496.00	-7.6%	6232.19	Naspers Ltd	146018.00	139250.00	4.9%	139653.08

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Sai Gon Thuong Tin Commercial	21750.00	6.9%	-31.0%	390460.35	Vietnam Rubber Group JSC	34900.00	-5.0%	-24.8%	1472825.37
Saigon Securities Inc	28100.00	6.0%	-45.8%	613583.17	Hoa Phat Group JSC	34900.00	-5.0%	-24.8%	1472825.37
Masan Group Corp	109000.00	4.3%	-23.5%	90459.10	Khang Dien House Trading & Investment	40100.00	-2.0%	-21.4%	28996.31
Vietnam JSC Bank	26000.00	4.0%	-23.3%	115676.60	Vietnam National Petroleum Group	40000.00	-0.6%	-25.8%	30836.00
Vinamilk	68900.00	3.9%	-18.9%	140073.70	Saigon Beer Alcohol Beverage Corp.	154000.00	-0.1%	4.2%	27427.40
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Phu Nhuan Jewelry	107900.00	124000.00	-13.0%	64653.68	Vietnam Rubber Group JSC	34900.00	34200.00	2.0%	1472825.37
Saigon Beer Alcohol Beverage Corp.	154000.00	181400.00	-15.1%	27427.40	Hoa Phat Group JSC	34900.00	34200.00	2.0%	1472825.37
Vietjet Aviation	125300.00	149000.00	-15.9%	76282.64	Vietnam Prosperity	30000.00	28950.00	3.6%	296760.00
FPT Corp	98200.00	118900.00	-17.4%	135977.54	Vietcombank	75600.00	72386.80	4.4%	67941.72
Petrovietnam Gas	105800.00	128400.00	-17.6%	88914.32	Phat Dat Real Estate Development Corp	53200.00	50800.00	4.7%	111305.04

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