

Daily Market Report

26 May 2022

JSE

JSE All-Share was down by 0.16% to close at 67,585.25 points on Wednesday, as the Financial sector recorded losses.

BRVM

BRVM Composite Index closed at 204.88 points, down by 0.05% on Wednesday with Bollore Transport & Logistics and Sucrivoire Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index rose by 1.24% to close at 52,591.41 points on Wednesday, despite negative performance across key sectors.

EGX

EGX 30 Index dropped by 1.61% to close at 10,247.43 points on Wednesday, as the market lost LE 9.6 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index inched up 0.02% to close at 932.09 points on Wednesday.

African Markets

Nigeria: NSE 30 Index declined by 0.84% and closed at 1,961.74 points on Wednesday. FBNH and International Breweries were the top losers.

Egypt: EGX 30 Index dropped by 1.61% to close at 10,247.43 points on Wednesday, as the market lost LE 9.6 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index increased by 0.42% and closed at 1,667.03 points on Wednesday. WPP Scangroup and Centum Investment Company were the top losers.

South Africa: JSE Top 40 Index inched down by 0.001% to close at 61,176.02 points on Wednesday, as the Financial sector recorded losses.

Capital Markets

JSE
Johannesburg Stock Exchange ▼ 0.16%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.05%

NSE
Nigerian Stock Exchange ▲ 1.24%

EGX
Egyptian Stock Exchange ▼ 1.61%

ESG
Casablanca Stock Exchange ▲ 0.02%

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.72
INTERBANK RATES	
OPR	12.96 ▲
Overnight	13.50 ▲

Other Emerging Markets

Abu Dhabi: ADX Index rose by 0.92% to close at 9,559.27 points on Wednesday, as gains in the Consumer Discretionary, Energy, Financials, Industrials, Health Care, and Telecom sectors led shares higher. MSCI UAE increased by 0.8% to close at 451.74 points.

Vietnam: VN-30 Index surged by 2.98% to close at 1,310.70 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.56% to close at 849.18 points.

Saudi Arabia: Tadawul All Share Index advanced by 2.34% to close at 12,588.89 points on Wednesday, as gains in the Media & Publishing, Agriculture & Food and Energy & Utilities sectors led shares higher. MSCI Saudi Arabia jumped 2.65% to close at 1,749.67 points.

India: Nifty 50 Index decreased by 0.62% to close at 16,025.80 points on Wednesday, as losses in the IT, Real Estate and Capital Goods sectors pushed shares lower. MSCI India declined by 0.99% to close at 1,852.51 points.

News

Nigeria:

ICT firms' borrowing from banks rises to ₦982.87bn
Presco declares ₦7.6b dividend as profit rises by 277%
Money laundering: CBN tightens control on MfBs, others

Kenya:

KCB first quarter profit jumps to Sh9.9 billion
Absa Kenya first quarter profit up 22 percent to Sh2.95bn
Afrinvest raises Sh47bn for regional investments

Abu Dhabi:

UAE's non-oil foreign trade reaches record \$136bn in first quarter
UAE telecom firm e& launches the region's first telco NFT collection
Davos 2022: UAE and WEF team up to boost future co-operation

Saudi Arabia:

Saudi Arabia's non-oil exports jump 29% to \$21bn in Q1 2022
Saudi oil refinery output up 16.6% YoY in March, exports down 12.2%
STC Group and Alibaba to set up \$238m Saudi cloud services venture

Egypt:

Egypt seeks to maximise trade deal with Israel to unlock \$5bn in exports
Egypt to unveil projects worth \$860m in collaboration with private sector
EFG Hermes Holding records 55% Y-o-Y increase in revenues in 1Q22

South Africa:

SA revamps processes for managing distressed banks
Glencore prepares to pay up to \$1.5 bln to settle U.S., UK, Brazil probes
Tiger Brands reports muted interims, anticipates significant price increases

India:

Cabinet okays 29.5% sale in Hind Zinc, may get Rs 38,000 crore
Andhra Pradesh in \$16 billion pacts involving Adani, GIC-backed Greenko
UK insurance broker Howden to buy 100% in Indian arm

Vietnam:

Budget deficit sees 34-pct surge
High demand pushes industrial land rent up
Vietrade consultation to spur exports to Kuwait

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,559.27	0.9%	-3.8%	-5.2%	12.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,247.43	-1.6%	-2.9%	-7.2%	-14.0%	EGP/USD	18.60	0.5%	18.4%
India	16,025.80	-0.6%	-1.5%	-6.3%	-7.7%	INR/USD	77.53	-0.1%	4.3%
Kenya	1,677.03	0.4%	-0.2%	-6.9%	-11.9%	KES/USD	116.60	0.0%	3.0%
Nigeria	1,961.74	-0.8%	-3.4%	4.0%	13.9%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	12,588.89	2.3%	1.3%	-8.3%	11.1%	SAR/USD	3.75	0.0%	-0.1%
South Africa	61,176.02	-0.001%	0.3%	-6.6%	-8.8%	ZAR/USD	15.75	0.3%	-1.3%
Vietnam	1,310.70	3.0%	2.2%	-7.5%	-14.7%	VND/USD	23,197.50	0.1%	1.8%

MSCI Emerging Markets

MSCI Frontier	544.32	0.6%	-0.5%	-7.7%	-18.2%	Brent Crude (\$)	114.03	0.4%	46.6%
MSCI Frontier 100	1,264.09	0.8%	-0.4%	-8.3%	-17.6%	Gold (\$)	1,852.50	-1.0%	1.3%
MSCI Emerging	1,019.59	0.3%	-1.5%	-5.3%	-17.2%	Copper (\$)	9,373.00	-0.9%	-3.6%
MSCI World (USD)	2,700.09	0.7%	1.7%	-3.4%	-16.5%	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 ₦)
Airtel Africa	1608.00	9.4%	68.4%	647.70	P Z Cussons	11.35	-9.9%	86.1%	34.66
Custodian	7.10	1.4%	-9.0%	20.79	FBNH	10.55	-8.7%	-8.3%	327.32
UACN	12.90	1.2%	34.4%	618.64	International Breweries	7.50	-6.3%	59.6%	41.81
					Lafarge Africa	26.50	-5.5%	11.8%	116.09
					Flour Mills	35.00	-5.4%	23.5%	34.01
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%	186.66	Nestle	1401.40	1384.50	1.2%	10.70
Julius Berger	30.50	30.50	0.0%	12.18	Access	9.70	9.50	2.1%	297.70
Airtel Africa	1608.00	1608.00	0.0%	647.70	Zenith	23.60	22.00	7.3%	362.03
Seplat Petroleum	1300.00	1300.10	0.0%	3.24	Stanbic IBTC	34.50	32.15	7.3%	10.30
BUA Cement	74.25	74.50	-0.3%	17.55	UBA	7.65	7.00	9.3%	243.67

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National for Building Materials	0.20	13.6%	-19.7%	0.01	National Bank of Ras Al Khaimah	4.70	-3.9%	4.4%	1.26
Abu Dhabi Islamic Bank	8.00	5.3%	16.4%	29.34	Response Plus Holding	8.71	-3.0%	-9.7%	5.18
ESG EMIRATES STALLIONS GROUP P.J.S.C	7.43	4.7%	-7.1%	12.00	Ghitha Holding P.J.S.C.	86.40	-2.4%	214.2%	28.22
APEX INVESTMENT P.S.C	4.86	3.85%	-27.5%	4.30	Abu Dhabi Commercial Bank	9.20	-1.5%	7.9%	32.26
RAK Co. for White Cement & Construction	2.18	3.8%	28.2%	0.01	PALMS SPORTS	10.90	-1.3%	-10.8%	1.19
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	Du	5.90	5.80	1.7%	1.47
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Palms Sports PJSC	10.90	10.50	3.8%	1.19
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Pharma Ind.	1.25	1.20	4.2%	2.85
Sharjah Insurance	1.38	1.38	0.0%	0.00	Abu Dhabi National Takaful	4.86	4.65	4.6%	0.00

Egypt

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
					GB AUTO	3.00	-10.7%	-41.2%	26.42
					MM Group For Industry And Intl Trade	2.90	-7.9%	-57.8%	19.50
					Ibsina Pharma	2.00	-6.5%	-50.9%	16.18
					Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.10	-6.3%	-12.5%	1.27
					Palm Hills Devp Co	1.28	-5.8%	-0.1%	2.59
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	15.96	15.96	0.0%	0.53	Commercial Intl Bank	41.40	41.40	0.0%	71.71
Sidi Kerir Petrochemicals	7.79	7.79	0.0%	2.59	Credit Agricole	5.91	5.91	0.0%	1.08
Oriental Weavers	7.14	7.14	0.0%	1.94	Fawry For Banking Tech & E- Payment	4.00	4.00	0.0%	50.63
Misr Fertilizers ProductionCompany - Mopco	102.90	102.90	0.0%	14.60	GB AUTO	3.00	3.00	0.0%	26.42
Heliopolis Housing	4.93	4.93	0.0%	12.12	Ibsina Pharma	2.00	2.00	0.0%	16.18

*No gainers on 25/5

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	152.60	3.9%	22.7%	2994.174	Asian Paints	2839.00	-8.0%	-16.1%	9798.19
HDFC Life Insurance Company Ltd	569.00	2.9%	-12.4%	3032.73	Adani Ports And Sez.	710.00	-5.6%	-2.8%	5550.43
SBI Life Insurance	1094.00	1.9%	-8.5%	3525.95	Divi's Laboratories	3512.00	-4.1%	-24.9%	5658.40
Bharti Airtel	688.15	1.5%	0.6%	2867.08	UPL	761.00	-4.0%	1.9%	1145.62
ONGC	152.80	1.4%	7.3%	2918.33	Tech Mahindra	1064.00	-3.1%	-40.6%	4998.19
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Mahindra & Mahindra	930.05	979.00	-5.0%	1275.11	Shree Cement	21110.50	21079.95	0.1%	730.48
Sun Pharma Industries	912.30	967.05	-5.7%	2193.43	Divi's Laboratories	3512.00	3497.25	0.4%	5658.40
NTPC	152.60	166.35	-8.3%	2994.17	Bharat Petroleum	325.80	324.00	0.6%	1341.25
Reliance Industries	2613.40	2856.15	-8.5%	15407.62	Tata Steel	998.45	991.80	0.7%	9973.18
Power Grid Corp Of India	225.00	248.35	-9.4%	1866.90	Wipro	446.70	443.20	0.8%	3469.56

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	2.97	3.8%	-28.3%	0.17	Nation Media Group	19.50	-3.2%	5.7%	0.04
Centum Investment Company Plc	10.40	2.5%	-26.2%	0.08	British American Tobacco Kenya Ltd	416.00	-1.0%	-5.8%	0.04
Diamond Trust Bank Limited	50.00	2.0%	-16.0%	2.18	Total Kenya Ltd	22.70	-0.7%	-9.2%	0.00
KCB Group Plc	36.55	1.7%	-19.6%	5.71	NCBA Group Plc	26.30	-0.6%	4.4%	3.90
Bamburi Cement Limited	35.75	1.1%	-5.9%	1.72	Kenya Reinsurance Corporation Ltd	2.01	-0.5%	-12.6%	0.07
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%	0.00	East African Breweries Limited	141.00	139.00	1.4%	123.12
NCBA Group Plc	26.30	29.00	-9.3%	3.90	Kengen Limited	3.48	3.40	2.4%	0.31
Bamburi Cement Limited	35.75	40.00	-10.6%	1.72	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	9.75
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	9.75	Kenya Reinsurance Corporation Ltd	2.01	1.96	2.6%	0.07
Total Kenya Ltd	22.70	27.50	-17.5%	0.00	Total Kenya Ltd	22.70	22.05	2.9%	0.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Riyad Bank	37.40	8.3%	38.0%	77.75	Saudi Industrial Export Co.	100.00	-5.5%	164.1%	220.49
Saudi Research and Marketing Group	247.00	7.0%	25.9%	19.55	Saudi Enaya Coop Insurance Co.	25.60	-3.2%	-17.7%	6.80
Bank Albilad	49.15	6.9%	6.0%	103.03	Salama Cooperative Insurance Co.	13.20	-2.9%	-22.4%	8.70
Saudi Electricity Co.	25.45	6.2%	6.1%	103.35	Amara Cooperative Insurance Co.	25.30	-2.7%	-26.5%	9.42
Almarai Co.	52.00	6.0%	6.7%	34.11	Buruj Cooperative Insurance Co.	20.90	-2.5%	-5.4%	5.01
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.	93.80	93.80	0.0%	186.67	Allied Cooperative Insurance Group	15.30	15.30	0.0%	4.19
Scientific and Medical Equipment House Co.	79.20	79.20	0.0%	37.97	Fawaz Abdulaziz Alhokair Co.	12.86	12.86	0.0%	11.31
Elm Co.	242.60	242.60	0.0%	184.29	National Shipping Co of Saudi Arabia	25.00	25.00	0.0%	17.23
Almunajem Foods Co.	71.30	71.30	0.0%	23.80	Savola Group	36.60	36.60	0.0%	30.30
Saudi Tadawul Group Holding Co.	211.60	211.60	0.0%	102.99	Tanmiah Food Co.	72.30	72.30	0.0%	4.87

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	152688.00	4.6%	-38.2%	161798.13	Exxaro Resources	20460.00	-4.0%	33.8%	26188.33
Prosus NV	72644.00	4.2%	-44.5%	122846.60	MTN Group	15700.00	-3.7%	-8.0%	96703.77
British American Tobacco PLC	70650.00	3.3%	20.6%	109366.62	Discovery Ltd	13366.00	-3.5%	-6.9%	23811.09
Cie Financiere Richemont SA	15600.00	3.0%	-35.4%	99596.55	Capitec Bank Holdings Ltd	203500.00	-3.1%	0.5%	73953.73
Anglo American PLC	73291.00	2.1%	13.6%	116129.66	NEPI Rockcastle PLC	9085.00	-3.0%	-14.3%	19431.01
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)
Glencore PLC	10270.00	10579.00	-2.9%	56748.17	SPAR Group Ltd	14507.00	14393.00	0.8%	12938.26
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Aspen Pharmacare Holdings Ltd	15447.00	14921.00	3.5%	25520.87
Sasol Ltd	38459.00	40798.00	-5.7%	93989.30	Woolworths Holdings Ltd	5150.00	4903.00	5.0%	24543.12
MultiChoice Group	12842.00	13973.00	-8.1%	11482.29	Mr Price Group Ltd	19604.00	18650.00	5.1%	27421.55
Investec PLC	9415.00	10346.00	-9.0%	15857.77	NEPI Rockcastle PLC	9085.00	8605.00	5.6%	19431.01

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phu Nhuan Jewelry	115400.00	7.0%	20.6%	197195.52	Vietnam Rubber Group JSC	34450.00	-1.3%	-25.8%	1357950.10
FPT Corp	105000.00	6.9%	12.9%	395934.00	Hoa Phat Group JSC	34450.00	-1.3%	-25.8%	1357950.10
Vietnam Prosperity	31500.00	5.0%	-12.0%	404444.25	Phat Dat Real Estate Development Corp	52800.00	-0.8%	-24.4%	126477.12
Vincom Retail	29450.00	4.8%	-2.2%	121369.34					
Sai Gon Thuong Tin Commercial	22750.00	4.6%	-27.8%	462996.63					
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	115400.00	124000.00	-6.9%	197195.52	Phat Dat Real Estate Development Corp	52800.00	50800.00	3.9%	126477.12
FPT Corp	105000.00	118900.00	-11.7%	395934.00	Vietnam Rubber Group JSC	34450.00	33050.00	4.2%	1357950.10
Mobile World Inv. Corp	139000.00	162800.00	-14.6%	216562.00	Hoa Phat Group JSC	34450.00	33050.00	4.2%	1357950.10
Saigon Beer Alcohol Beverage Corp.	154000.00	181400.00	-15.1%	30214.80	Vietcombank	77000.00	72386.80	6.4%	62909.00
Petrovietnam Gas	108400.00	128400.00	-15.6%	82915.16	Vingroup JSC	77700.00	72700.00	6.9%	105703.08

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