

Daily Market Report

27 May 2022

JSE

JSE All-Share jumped by 2.81% to close at 69,483.76 points on Thursday, as the Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index was closed Thursday on account of Ascension Day.

NSE

NSE All-Share Index rose by 1.06% to close at 53,151.32 points on Thursday, as the Banking, Consumer goods, Insurance, and Industrial sectors recorded gains.

EGX

EGX 30 Index decreased by 0.46% to close at 10,200.56 points on Thursday, as the market shed around LE 4.29 billion of market cap, amid Egyptian and Arab selling.

ESG

Casablanca ESG 10 Index was up by 0.19% to close at 933.89 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 2.81%
BRVM Bourse Régionale des Valeurs Mobilières	↔ 0.00%
NSE Nigerian Stock Exchange	▲ 1.06%
EGX Egyptian Stock Exchange	▼ 0.46%
ESG Casablanca Stock Exchange	▲ 0.19%

African Markets

Nigeria: NSE 30 Index climbed by 1.52% and closed at 1,991.61 points on Thursday. Lafarge Africa and International Breweries were the top gainers.

Egypt: EGX 30 Index decreased by 0.46% to close at 10,200.56 points on Thursday, as the market shed around LE 4.29 billion of market cap, amid Egyptian and Arab selling.

Kenya: NSE 20 Index was up by 0.10% and closed at 1,678.69 points on Thursday. Equity Group Holdings and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index surged by 3.01% to close at 63,019.00 points on Thursday, as the Industrial, Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.72
INTERBANK RATES	
OPR	13.67 ▲
Overnight	14.08 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.16% to close at 9,543.87 points on Thursday, as losses in the Consumer Discretionary, Energy, Financials, and Industrials, sectors led shares lower. MSCI UAE increased by 0.62% to close at 454.52 points.

Vietnam: VN-30 Index edged down by 0.09% to close at 1,309.50 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam edged down by 0.04% to close at 848.86 points.

Saudi Arabia: Tadawul All Share Index declined by 0.47% to close at 12,530.34 points on Thursday, as losses in the Media and Entertainment, Utilities and Energy sectors led shares lower. MSCI Saudi Arabia decreased by 0.71% to close at 1,737.23 points.

India: Nifty 50 Index increased by 0.90% to close at 16,170.15 points on Thursday, as gains in the Metals, Banking and Real Estate sectors led shares higher. MSCI India advanced by 0.94% to close at 1,869.96 points.

News

Nigeria:

Cash-strapped banks borrow N338.4bn from CBN in one month
Manufacturing trade deficit hits N2.6tn despite forex shortage
CBN defends naira with \$3.36bn in two months

Kenya:

Q1 mobile money agent deals hit Sh1.8trn as low spending slows growth
Co-operative Bank profit hits Sh5.8 billion on revenue growth
Family Bank Acquires Ksh 1.95 bn for Onward Lending to SMEs

Abu Dhabi:

UAE collaborating with India to boost energy transition and industrial efforts
Trade between UAE and Israel exceeds \$1bn in first quarter of this year
Borouge's \$2b IPO said to attract BlackRock, Fidelity

Saudi Arabia:

Oil climbs on tight supply, prospect of EU ban on Russian crude
Saudi stock exchange approves listing of \$4bn government debt
Saudi ACWA Power, Oman's OQ and Air Products sign green hydrogen JDA

Egypt:

Egypt, South Africa sign deal to boost ties; Cairo plans to promote clean energy
Manufacturing and extractive index recorded 8.39% increase in March
Egypt, Saudi Arabia sign MoU in field of aluminum industries

South Africa:

SA factory gate inflation races to 13.1% in April, the highest level in over 13 years
African Bank Ltd to acquire Grindrod Bank in R1.5bn deal
ArcelorMittal strike ends as Numsa secures above-inflation increase

India:

Moody's slashes Indian economy growth forecast to 8.8% for 2022
CEAT to invest Rs 700-Rs 800 cr in Chennai plant as part of export ramp up
Korean giant Hyundai to drive in Rs 1400 crore investment in Telangana

Vietnam:

G&P Global Ratings raises Vietnam's sovereign credit rating
JPMorgan Chase announces fresh capital injection into Việt Nam
Reference exchange rate up 4 VND on May 27

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,543.87	-0.2%	-3.9%	-5.3%	12.4%	AED/USD	3.67	0.0%	0.0%
Egypt	10,200.56	-0.5%	-3.3%	-7.7%	-14.4%	EGP/USD	18.60	0.0%	18.4%
India	16,170.15	0.9%	-0.6%	-5.5%	-6.8%	INR/USD	77.58	0.1%	4.4%
Kenya	1,678.69	0.1%	-0.1%	-6.8%	-11.8%	KES/USD	116.65	0.0%	3.1%
Nigeria	1,991.61	1.5%	-1.9%	5.6%	15.6%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	12,530.34	-0.5%	0.8%	-8.8%	10.6%	SAR/USD	3.75	0.0%	-0.1%
South Africa	63,019.00	3.0%	3.3%	-3.8%	-6.0%	ZAR/USD	15.76	0.1%	-1.2%
Vietnam	1,309.50	-0.1%	2.1%	-7.6%	-14.7%	VND/USD	23,210.00	0.1%	1.8%

MSCI Emerging Markets

MSCI Frontier	545.45	0.2%	-0.3%	-7.5%	-18.1%	Brent Crude (\$)	117.40	3.0%	50.9%
MSCI Frontier 100	1,269.18	0.4%	0.0%	-8.0%	-17.2%	Gold (\$)	1,853.90	0.1%	1.4%
MSCI Emerging	1,022.96	0.3%	-1.2%	-4.9%	-17.0%	Copper (\$)	9,353.00	-0.2%	-3.8%
MSCI World (USD)	2,743.96	1.6%	3.3%	-1.8%	-15.1%	Coffee (\$)	192.06	1.5%	-3.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	28.15	6.2%	18.8%	62.33	UACN	11.65	-9.7%	21.4%	94.24
Transnational Corporation	1.27	5.8%	28.3%	60.11	Flour Mills	34.00	-2.9%	19.9%	62.34
International Breweries	7.90	5.3%	68.1%	7.26	Custodian	7.05	-0.7%	-9.6%	14.22
Unilever	14.95	5.3%	11.6%	20.46	United Capital PLC	12.85	-0.4%	29.8%	43.35
Guinness	92.70	5.1%	137.7%	152.15	Wema	3.36	-0.3%	325.3%	2.74
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%	21.16	Nestle	1401.40	1384.50	1.2%	54.73
Julius Berger	30.50	30.50	0.0%	23.65	Access	9.80	9.50	3.2%	248.09
Airtel Africa	1608.00	1608.00	0.0%	17.73	Stanbic IBTC	34.50	32.15	7.3%	59.26
Seplat Petroleum	1300.00	1300.10	0.0%	736.21	Zenith	23.85	22.00	8.4%	171.24
BUA Cement	74.25	74.50	-0.3%	1.96	Nascon	12.85	11.70	9.8%	0.41

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging	27.32	6.5%	109.5%	13.73	ARAM GROUP	2.45	-9.3%	-21.0%	0.00
FERTIGLOBE PLC	5.00	4.2%	42.0%	67.54	Abu Dhabi National for Building Materials	0.18	-8.0%	-26.1%	0.16
ARKAN BUILDING MATERIALS COMPANY	1.25	2.5%	-12.0%	1.69	Methaq Takaful Ins.	0.74	-5.6%	-8.5%	0.23
RESPONSE PLUS HOLDING	8.90	2.2%	-7.8%	1.23	Gulf Cement	0.54	-4.9%	-22.9%	0.00
Abu Dhabi Commercial Bank	9.40	2.2%	10.2%	26.82	ESG EMIRATES STALLIONS GROUP P.J.S.C	7.20	-3.1%	-10.0%	12.30
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	5.95	5.80	2.6%	0.88
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sudatel Telecom	0.33	0.32	4.1%	0.04
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Pharmaceutical Ind.	1.25	1.20	4.2%	0.95
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£)
Egyptian Financial Group-Hermes Holding Company	15.57	3.0%	5.1%	67.25	Palm Hills Dev. Company	1.17	-8.9%	-41.3%	18.39
Commercial International Bank(Egypt)	41.62	0.5%	-21.5%	54.75	GB AUTO	2.75	-8.3%	-46.1%	22.72
					MM Group For Industry And Int Trade	2.68	-7.6%	-61.0%	21.43
					Medinet Nasr Housing	2.01	-4.3%	5.4%	2.76
					Heliopolis Housing	4.78	-3.0%	-16.0%	2.25
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	15.54	15.54	0.0%	7.29	Commercial International Bank	41.62	41.62	0.0%	54.75
Sidi Kerir Petrochemicals	7.71	7.71	0.0%	1.74	Credit Agricole	5.90	5.90	0.0%	0.51
Oriental Weavers	7.03	7.03	0.0%	2.33	Fawry For Banking Tech. And E Payment	4.00	4.00	0.0%	16.54
Misr Fertilizers ProductionCompany - Mopco	102.79	102.79	0.0%	2.76	GB AUTO	2.75	2.75	0.0%	22.72
Heliopolis Housing	4.78	4.78	0.0%	17.30	Ibnsina Pharma	2.00	2.00	0.0%	9.05

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	1049.90	5.1%	-5.5%	15552.552	UPL	748.55	-2.0%	0.2%	1917.93
Apollo Hospitals Enterprise	3699.00	5.0%	-26.4%	6060.47	Divi's Laboratories	3455.00	-1.8%	-26.1%	8370.04
Jsw Steel	552.35	4.5%	-15.8%	4415.43	Sun Pharma Industries	901.85	-1.0%	6.6%	3716.37
State Bank Of India	469.60	3.4%	2.0%	7846.78	Reliance Industries	2589.00	-0.9%	9.3%	21351.83
Hdfc Bank	1369.00	3.0%	-7.5%	18295.20	ONGC	151.55	-0.7%	6.4%	1927.33
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	266.90	282.35	-5.5%	4898.84	Wipro	454.60	443.20	2.6%	2600.05
Sun Pharma Industries	901.85	967.05	-6.7%	3716.37	Divi's Laboratories Limited	3455.00	3365.55	2.7%	8370.04
NTPC	154.20	166.35	-7.3%	3462.59	Ultratech Cement	5845.05	5629.20	3.8%	2974.60
Power Grid Corp Of India	228.50	248.35	-8.0%	2400.52	Bharat Petroleum	324.60	312.20	4.0%	2561.30
Eicher Motors	2728.00	2994.00	-8.9%	2309.42	Grasim Industries	1396.25	1340.25	4.2%	2133.84

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Equity Group Holdings Plc	42.90	2.1%	-18.7%	14.41	Centum Investment Company Plc	10.00	-3.8%	-29.1%	6.01
Nation Media Group	19.90	2.1%	7.9%	0.05	Bamburi Cement	35.55	-0.6%	-6.4%	1.54
KCB Group Plc	37.10	1.5%	-18.4%	23.26	Nairobi Securities Exchange Plc	8.00	-0.5%	0.0%	2.00
Kenya Reinsurance Corporation Ltd	2.04	1.5%	-11.3%	0.04	The Cooperative Bank of Kenya Ltd	11.45	-0.4%	-11.6%	20.58
Absa Bank Kenya	10.10	1.4%	-14.8%	0.79	British American Tobacco Kenya Ltd	415.75	-0.1%	-5.8%	0.25
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%	28.92
NCBA Group Plc	26.45	29.00	-8.8%	20.52	Kengen Limited	3.48	3.40	2.4%	0.22
Bamburi Cement Limited	35.55	40.00	-11.1%	1.54	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	8.73
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	8.73	Diamond Trust Bank Limited	50.00	48.50	3.1%	0.24
Total Kenya Ltd	22.80	27.50	-17.1%	0.00	The Cooperative Bank of Kenya Ltd	11.45	11.10	3.2%	20.58

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Abdulmohsen Alhokair Group for Tourism and Development	14.74	10.0%	-14.7%	32.60	Wataniya Insurance Co.	15.52	-8.8%	-62.0%	32.78
CHUBB Arabia Cooperative Insurance Co.	25.00	4.1%	-31.6%	47.35	Amana Cooperative Insurance Co.	23.82	-5.9%	-30.8%	30.00
Fawaz Abdulaziz Alhokair Co.	13.36	3.9%	-14.1%	40.08	Arabia Insurance Cooperative Co.	24.40	-3.4%	-38.3%	3.37
AYYAN Investment Co	20.32	3.9%	-0.1%	27.65	Gulf Union Alahlia	10.40	-2.4%	-37.1%	1.47
Saudi Fisheries Co.	36.30	3.9%	-20.2%	19.41	Saudi Investment Bank	21.94	-2.4%	12.2%	60.69
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.	78.10	78.10	0.0%	22.39	Allied Cooperative Insurance Group	15.28	15.28	0.0%	3.31
Elm Co.	247.40	247.40	0.0%	146.96	Fawaz Abdulaziz Alhokair Co.	13.36	13.36	0.0%	40.08
Almunajem Foods Co.	71.40	71.40	0.0%	25.22	National Shipping Co of Saudi Arabia	24.98	24.98	0.0%	11.71
Saudi Tadawul Group Holding Co.	218.40	218.40	0.0%	126.49	Savola Group	36.25	36.25	0.0%	14.70
Development Works Food	265.00	265.00	0.0%	21.26	Tanmiah Food Co.	72.10	72.10	0.0%	4.12

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum Ltd	168810.00	7.1%	-4.0%	38261.29	Vodacom Group Ltd	14370.00	-0.3%	6.7%	22117.18
Impala Platinum Holdings Ltd	21359.00	6.3%	-5.1%	61267.99	Exxaro Resources	20445.00	-0.1%	33.7%	14698.83
Sibanye Stillwater Ltd	4998.00	5.8%	1.8%	42728.81					
Northam Platinum Ltd	18650.00	5.3%	-11.0%	23201.59					
Sasol Ltd	40500.00	5.3%	56.4%	98246.28					
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	70860.00	71456.00	-0.8%	63646.66	SPAR Group Ltd/The	14805.00	14393.00	2.9%	9344.32
Glencore PLC	10299.00	10579.00	-2.6%	38506.73	Aspen Pharmacare Holdings Ltd	15928.00	14921.00	6.7%	14855.81
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Mr Price Group Ltd	20079.00	18650.00	7.7%	24525.78
MultiChoice Group	13170.00	13973.00	-5.7%	10961.60	Woolworths Holdings Ltd	5279.00	4903.00	7.7%	24278.15
Investec PLC	8825.00	9686.15	-8.9%	31291.66	NEPI Rockcastle PLC	9446.00	8605.00	9.8%	11936.57

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam National Petroleum Group	42550.00	2.8%	-21.1%	70228.78	PetroVietnam Power Corp	13150.00	-1.9%	-24.9%	131797.19
Saigon Securities Inc	29450.00	2.3%	-43.1%	856718.17	Masan Group Corp	108600.00	-1.7%	-23.8%	90572.40
Hoa Phat Group JSC	35000.00	1.6%	-24.6%	567903.00	Sai Gon Thuong Tin Commercial	22400.00	-1.5%	-28.9%	341962.88
Vietnam Rubber Group JSC	35000.00	1.6%	-24.6%	567903.00	Vietnam Prosperity	31050.00	-1.4%	-13.3%	267880.77
Phat Dat Real Estate Development Corp	53600.00	1.5%	-23.3%	147298.16	Military Commercial Bank	27650.00	-1.4%	-4.3%	200761.12
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	114300.00	124000.00	-7.8%	55138.32	Phat Dat Real Estate Development Corp	53600.00	50800.00	5.5%	147298.16
FPT Corp	105600.00	118900.00	-11.2%	150627.84	Vietnam Rubber Group JSC	35000.00	33050.00	5.9%	567903.00
Mobile World Inv. Corp	139000.00	162800.00	-14.6%	99537.90	Hoa Phat Group JSC	35000.00	33050.00	5.9%	567903.00
Saigon Beer Alcohol Beverage Corp.	153000.00	181400.00	-15.7%	34792.20	Vietcombank	76700.00	72386.80	6.0%	75081.63
Vietjet Aviation	125000.00	149000.00	-16.1%	72962.50	Vingroup JSC	77700.00	72700.00	6.9%	161359.59

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