

Daily Market Report

31 May 2022

JSE

JSE All-Share rose by 2.09% to close at 71,958.13 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 208.32 points, up by 1.03% on Monday with Sode Côte d'Ivoire and Solibra Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 0.58% to close at 53,772.14 points on Monday, as the Banking, Consumer goods, and Industrial sectors recorded losses.

EGX

EGX 30 Index increased by 0.22% to close at 10,109.36 points on Monday, as the market added around LE 1.02 billion to market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index decreased by 0.38% to close at 923.00 points on Monday.

African Markets

Nigeria: NSE 30 Index declined by 0.93% and closed at 1,965.55 points on Monday. Presco and MTNN were the top losers.

Egypt: EGX 30 Index increased by 0.22% to close at 10,109.36 points on Monday, as the market added around LE 1.02 billion to market cap, amid Egyptian purchases.

Kenya: NSE 20 Index inched up by 0.05% and closed at 1,688.60 points on Monday. Equity Group Holdings and National Media Group were the top gainers.

South Africa: JSE Top 40 Index jumped by 2.27% to close at 65,335.09 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 2.09%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 1.03%

NSE

Nigerian Stock Exchange ▼ 0.58%

EGX

Egyptian Stock Exchange ▲ 0.22%

ESG

Casablanca Stock Exchange ▼ 0.38%

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.57
INTERBANK RATES	
OPR	12.83 ▼
Overnight	13.67 ▼

Other Emerging Markets

Abu Dhabi: ADX Index jumped by 2.26% to close at 9,907.59 points on Monday, as gains in the Consumer Discretionary, Consumer Staples, Energy, Financials, Industrials and Basic Materials sectors led shares higher. MSCI UAE surged by 3.19% to close at 475.1 points.

Vietnam: VN-30 Index increased by 0.54% to close at 1,342.87 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.45% to close at 860.71 points.

Saudi Arabia: Tadawul All Share Index advanced by 1.72% to close at 12,907.17 points on Monday, as gains in the Media and Entertainment, Software & Services, and Banking sectors led shares higher. MSCI Saudi Arabia climbed by 1.72% to close at 1,787.14 points.

India: Nifty 50 Index advanced by 1.89% to close at 16,661.40 points on Monday, as gains in the Financial, IT, Auto and FMCG sectors led shares higher. MSCI India jumped by 2.26% to close at 1,932.12 points.

News

Nigeria:

Customs, firm sign \$3.2bn digitisation deal, FG targets \$176bn revenue
Manufacturers' spending on alternative power soars to N425bn
Discos, Gencos, others' revenue shortfall rises to N1.6tn

Kenya:

CBK Hikes Benchmark Rate to 7.50%
Current account deficit widens on import costs
Kenya takes Sh138bn World Bank loan in months

Abu Dhabi:

Adnoc Drilling buys two offshore jack-up rigs to expand its drilling fleet
Agthia to invest Dh90m in Saudi Arabia for protein food production
Aldar awards projects to 5 tech start-ups through accelerator programme

Saudi Arabia:

Oil above \$120 a barrel as EU meets on Russia sanctions
UAE, China remain Saudi Arabia's top non-oil export destinations
Microsoft reinforces startup revolution in Saudi Arabia

Egypt:

FRA launches 2nd phase of 2022-2026 strategy
Industrial sector achieves highest rate of exports in years, reaching \$32 bln
NBE, Banque Misr suspend 18% saving certificate, offer new one with 14% return

South Africa:

Nedbank earnings in line with its forecasts in spite of weakening economy
Pepkor interims reflect an increasingly exciting business
Sanlam Private Equity buys payment solutions provider Q Link

India:

TaMo, Ford ink pact with Gujarat for Sanand plant buy
Govt allots Rs 3,683 cr project to Jio, Airtel for 4G services in villages
LIC Q4 profit drops 18% on lower surplus

Vietnam:

Hanoi's CPI grows over 3 percent in five months
HoSE applies new trading rule for restricted stocks
Reference exchange rate down 32 VND

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,907.59	2.3%	2.3%	-1.7%	16.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,109.36	0.2%	-0.9%	-8.5%	-15.1%	EGP/USD	18.61	0.0%	18.4%
India	16,661.40	1.9%	1.9%	-2.6%	-4.0%	INR/USD	77.54	0.0%	4.3%
Kenya	1,688.60	0.05%	0.05%	-6.2%	-11.2%	KES/USD	116.70	0.0%	3.1%
Nigeria	1,965.55	-0.9%	-0.9%	4.2%	14.1%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	12,907.17	1.7%	3.0%	-6.0%	13.9%	SAR/USD	3.75	0.0%	-0.1%
South Africa	65,335.09	2.3%	2.3%	-0.2%	-2.6%	ZAR/USD	15.50	-0.4%	-2.9%
Vietnam	1,342.87	0.5%	0.5%	-5.3%	-12.6%	VND/USD	23,180.00	-0.1%	1.7%

MSCI Emerging Markets

MSCI Frontier	552.11	0.8%	0.8%	-6.3%	-17.1%	Brent Crude (\$)	122.80	2.8%	57.9%
MSCI Frontier 100	1,286.78	1.0%	1.0%	-6.7%	-16.1%	Gold (\$)	1,855.40	-0.1%	1.5%
MSCI Emerging	1,065.09	2.1%	2.1%	-1.0%	-13.5%	Copper (\$)	9,543.00	0.9%	-1.8%
MSCI World (USD)	2,814.75	0.4%	0.4%	0.7%	-12.9%	Coffee (\$)	199.94	1.7%	0.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	11.50	9.5%	19.8%	23.12	Presco	162.00	-10.0%	84.5%	74.87
United Capital PLC	13.45	5.1%	35.9%	14.85	Wema	3.40	-6.8%	330.4%	17.81
Axamansard	2.12	4.4%	-4.9%	0.90	Transnational Corporation	1.22	-6.2%	23.2%	85.10
FBNH	11.85	3.0%	3.0%	91.82	MTNN	230.00	-3.0%	26.4%	526.47
Nestle	1400.00	1.8%	-1.1%	821.85	Fidelity	3.30	-2.9%	29.4%	19.75
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%	134.55	Nestle	1400.00	1390.00	0.7%	821.86
Airtel Africa	1767.00	1767.00	0.0%	88.78	Access	10.00	9.50	5.3%	212.49
Seplat Petroleum	1300.00	1300.10	0.0%	74.06	Stanbic IBTC	34.00	32.15	5.8%	65.46
BUA Cement	74.25	74.50	-0.3%	8.99	Zenith	23.85	22.00	8.4%	106.55
Cadbury	17.70	17.85	-0.8%	2.52	Sterling	1.51	1.38	9.4%	15.91

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Adc Acquisition Corporation Pjsc	1.84	145.3%	145.3%	3.01	RAK Co. for White Cement & Construction	2.06	-5.5%	21.2%	0.21
Abu Dhabi National Takaful	6.41	14.9%	4.1%	0.07	Gulf Cement	0.55	-3.3%	-21.4%	0.02
Sudatel Telecom	0.36	6.6%	1.7%	0.09	Abu Dhabi Nat. for Building Materials	0.18	-3.3%	-29.7%	0.01
Sharjah Cement	0.65	5.6%	-15.9%	0.14	Apex Investment	5.04	-0.8%	-24.8%	7.94
Al Dar Properties	5.18	5.3%	29.8%	244.58	National Bank of Ras Al Khaimah	4.67	-0.6%	3.8%	0.88
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	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	Abu Dhabi Nat for Building Materials	0.18	0.17	2.9%	0.01
Sharjah Insurance	1.38	1.38	0.0%	0.00	Du	6.00	5.80	3.4%	6.80
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.02	Gulf Pharma Ind.	1.28	1.20	6.7%	0.40

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Medinet Nasr Housing	2.05	3.5%	-29.8%	6.26	E-finance For Digital and Financial Inv	16.01	-1.8%	-21.1%	49.97
T M G Holding	7.75	3.3%	-14.6%	14.28	Egyptian Financial Group-Hermes	14.80	-1.5%	-0.1%	112.68
Alexandria Mineral Oils	3.63	2.5%	-0.8%	6.58	Ibnsina Pharma	1.96	-1.0%	-51.8%	8.97
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.08	2.5%	-13.3%	1.50	Credit Agricole Egypt	5.85	-0.9%	1.7%	31.16
Heliopolis Housing	4.65	2.0%	-30.7%	51.53	Misr Fertilizers Prod Company - Mopco	101.03	-0.8%	-62.2%	7.06
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	15.50	15.50	0.0%	2.36	Commercial International. Bank	40.84	40.84	0.0%	127.75
Sidi Kerir Petrochemicals	7.64	7.64	0.0%	1.11	Credit Agricole	5.85	5.85	0.0%	1.30
Oriental Weavers	6.71	6.71	0.0%	3.16	Fawry For Banking Tech. & E-Payment	4.05	4.05	0.0%	11.66
Misr Fertilizers Production Company - Mopco	101.03	101.03	0.0%	2.41	GB AUTO	2.98	2.98	0.0%	4.58
Heliopolis Housing	4.65	4.65	0.0%	51.53	Ibnsina Pharma	1.96	1.96	0.0%	8.97

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1000.00	5.0%	19.5%	11579.606	Kotak Mahindra Bank	1907.00	-2.0%	6.2%	7658.89
Titan Company	2254.95	4.9%	-10.6%	3783.25	Jsw Steel	537.70	-2.0%	-18.0%	6564.92
Infosys	1529.00	4.6%	-19.0%	16563.50	Sun Pharma Industries	889.00	-1.7%	5.1%	3169.39
Adani Ports And Sez.	735.00	4.5%	0.6%	4034.51	Dr Reddys Lab	4364.30	-0.6%	-11.1%	2032.97
Larsen & Toubro	1662.50	3.9%	-12.3%	3495.23	ITC	269.00	-0.1%	23.4%	3177.80
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	269.00	282.35	-4.7%	3177.80	Jsw Steel	537.70	520.05	3.4%	6564.92
Reliance Industries	2668.00	2856.15	-6.6%	16882.06	Bharat Petroleum	329.35	312.20	5.5%	1158.81
Eicher Motors	2765.00	2994.00	-7.6%	1633.04	Tata Steel	1047.00	991.80	5.6%	7648.86
Sun Pharma Industries	889.00	967.05	-8.1%	3169.39	Divi's Laboratories	3572.95	3365.55	6.2%	2997.77
Power Grid Corp Of India	228.20	248.35	-8.1%	1592.68	Wipro	476.20	443.20	7.4%	2935.25

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	45.20	2.7%	-14.3%	5.33	Bamburi Cement Limited	32.50	-7.5%	-14.5%	0.29
Nation Media Group	19.55	1.8%	6.0%	0.32	NCBA Group Plc	26.35	-1.9%	4.6%	0.40
Absa Bank Kenya	10.20	1.5%	-13.9%	1.08	Safaricom Plc	26.25	-0.8%	-30.8%	67.34
Kenya Power & Lighting Limited	1.50	1.4%	-14.3%	0.52	Kengen Limited	3.49	-0.3%	-16.7%	0.26
Kenya Reinsurance Corporation Ltd	2.07	1.0%	-10.0%	0.05					
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	Bamburi Cement Limited	32.50	32.00	1.6%	0.29
NCBA Group Plc	26.35	29.00	-9.1%	0.40	East African Breweries Limited	141.50	139.00	1.8%	20.46
The Cooperative Bank of Kenya Ltd	12.05	14.00	-13.9%	12.47	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	5.54
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	5.54	Kengen Limited	3.49	3.40	2.6%	0.26
Total Kenya Ltd	22.90	27.50	-16.7%	0.08	Safaricom Plc	26.25	25.50	2.9%	67.34

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.	98.40	9.9%	159.8%	98.09	Saudi Enaya Coop Insurance Co.	25.70	-6.6%	-17.4%	62.70
Amana Cooperative Insurance	15.32	9.9%	-55.5%	0.55	Nama Chemicals Co.	42.60	-3.2%	32.1%	33.50
Banque Saudi Fransi	54.40	7.1%	15.1%	42.60	Middle East Healthcare Co.	37.55	-3.0%	18.6%	30.70
ACWA POWER Co.	155.00	7.0%	84.5%	385.68	United Electronics	117.00	-2.3%	-13.6%	34.57
Rabigh Refining and Petrochemical Co.	25.30	6.1%	22.2%	120.36	Salama Cooperative Insurance Co.	13.62	-2.3%	-19.9%	4.82
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.	95.00	95.00	0.0%	136.54	Allied Cooperative Insurance Group	15.00	15.00	0.0%	2.62
Nahdi Medical Co.	162.40	162.40	0.0%	71.85	Fawaz Abdulaziz Alhokair Co.	13.14	13.14	0.0%	7.67
Scientific and Medical Equipment House Co.	79.80	79.80	0.0%	22.25	National Shipping Company of Saudi Arabia	25.05	25.05	0.0%	30.79
Elm Co.	252.40	252.40	0.0%	192.87	Tanmiah Food Co.	73.60	73.60	0.0%	16.80
Almunajem Foods Co.	69.90	69.90	0.0%	88.25	The Company for Coop Insurance	61.90	61.90	0.0%	40.50

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	22058.00	6.9%	44.3%	37785.86	British American Tobacco PLC	67590.00	-3.2%	15.4%	79340.52
Nedbank Group Ltd	23220.00	5.4%	32.7%	65197.67	SPAR Group Ltd/The	14978.00	-0.8%	-10.4%	13769.38
Naspers Ltd	166826.00	5.2%	-32.5%	129667.68	Woolworths Holdings Ltd	5392.00	-0.7%	4.0%	15952.95
Standard Bank Group Ltd	17687.00	5.2%	26.3%	96952.09	Glencore PLC	10321.00	-0.2%	27.2%	24437.38
Prosus NV	79163.00	4.6%	-39.6%	72482.99	Mr Price Group Ltd	20319.00	-0.2%	1.8%	21098.90
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	10321.00	10579.00	-2.4%	24437.38	SPAR Group Ltd/The	14978.00	14393.00	4.1%	13769.38
Investec PLC	9434.00	9684.15	-2.6%	14194.94	Aspen Pharmacare Holdings Ltd	15930.00	14921.00	6.8%	17628.90
Investec Ltd	9526.00	9830.56	-3.1%	11822.19	Mr Price Group Ltd	20319.00	18650.00	8.9%	21098.90
Remgro Ltd	14896.00	15485.00	-3.8%	16337.32	Woolworths Holdings Ltd	5392.00	4903.00	10.0%	15952.95
MultiChoice Group	13308.00	13973.00	-4.8%	6990.49	NEPI Rockcastle PLC	9761.00	8605.00	13.4%	11497.85

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phu Nhuan Jewelry	122300.00	7.0%	27.9%	312757.79	Sai Gon Thuong Tin Commercial	22250.00	-0.7%	-29.4%	334646.68
FPT Corp	111800.00	5.9%	20.2%	433605.12					
Mobile World Inv. Corp	146700.00	5.5%	7.9%	374187.69					
Asia Commercial JS Bank	31800.00	4.8%	-7.8%	156163.44					
Khang Dien House Trading & Investment	42550.00	2.7%	-16.6%	61369.87					
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	122300.00	124000.00	-1.4%	312757.79	Phat Dat Real Estate Development Corp	54300.00	50800.00	6.9%	114594.72
FPT Corp	111800.00	118900.00	-6.0%	433605.12	Vietcombank	77400.00	72386.80	6.9%	69040.80
Mobile World Inv. Corp	146700.00	162800.00	-9.9%	374187.69	Vietnam Rubber Group JSC	35450.00	33050.00	7.3%	623632.86
Petrovietnam Gas	110000.00	128400.00	-14.3%	44517.00	Hoa Phat Group JSC	35450.00	33050.00	7.3%	623632.86
Vietjet Aviation	127000.00	149000.00	-14.8%	109054.90	Vingroup JSC	78000.00	72700.00	7.3%	122912.40

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