

Daily Market Report

10 June 2022

JSE

JSE All-Share dropped by 1.49% to close at 68,910.81 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 208.05 points, down by 0.46% on Thursday with Ecobank Transnational Inc and Setao Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index inched down by 0.04% to close at 53,170.73 points on Thursday, as the Banking sectors recorded losses.

EGX

EGX 30 Index slipped by 0.01% to close at 10,235.43 points on Thursday, amid foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.33% to close at 948.61 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.49%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.46%
NSE Nigerian Stock Exchange	▼ 0.04%
EGX Egyptian Stock Exchange	▼ 0.01%
ESG Casablanca Stock Exchange	▼ 0.33%

African Markets

Nigeria: NSE 30 Index decreased marginally by 0.05% and closed at 1,935.06 points on Thursday. Zenith and UBA were the top losers.

Egypt: EGX 30 Index slipped by 0.01% to close at 10,235.43 points on Thursday, amid foreign selling.

Kenya: NSE 20 Index dropped by 1.20% and closed at 1,683.41 points on Thursday. Centum Investment Company and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index fell by 1.61% to close at 62,427.08 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	16.82%
Exchange Rate	₦415.63
INTERBANK RATES	
OPR	7.25 ▼
Overnight	7.50 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.68% to close at 9,644.26 points on Thursday, as losses in the Energy, Financials, and Telecom sectors led shares lower. MSCI UAE declined by 1.07% to close at 458.44 points.

Vietnam: VN-30 Index inched up by 0.07% to close at 1,342.92 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam was up by 0.11% to close at 858.18 points.

Saudi Arabia: Tadawul All Share Index edged up by 0.06% to close at 12,603.89 points on Thursday, as gains in the Media & Publishing, Energy & Utilities and Financial Services sectors led shares higher. MSCI Saudi Arabia was up by 0.12% to close at 1,746.40 points.

India: Nifty 50 Index increased by 0.74% to close at 16,478.10 points on Thursday, as gains in the Oil & Gas, Healthcare and Technology sectors led shares higher. MSCI India increased by 0.80% to close at 1,905.73 points.

News

Nigeria:

Tier-1 Banks Witnessed Hike in CIR on Inflationary Pressure, Others Capital Importation Dropped to \$1.57bn in Q1 as Only Six States Attracted Inflows FG to sanction oil companies over law violation

Kenya:

Treasury raises Sh73 billion from tax-free bond Treasury cancels Sh115bn Eurobond, eyes bank loans Kenya FDI declines Sh31.5 billion amid rebound in the EAC

Abu Dhabi:

UAE signs deal with Philippines to boost and protect mutual investments AD Ports signs deal to launch logistics and freight joint ventures in Uzbekistan Dubai to list 12.5% of Tecom through IPO on Dubai Financial Market

Saudi Arabia:

Rabigh Refining shareholders approve 91% capital hike to \$4bn Saudi industrial activities hit three-year high in April Saudi Arabia offers to subsidize airlines to boost tourism

Egypt:

Egypt's annual inflation records 15.3% in May, urban inflation reaches 13.5% Egypt's annual core inflation records 13.3% in May: CBE Egypt repays \$24B in foreign debts, funds

South Africa:

SA's current account surplus widens slightly in March quarter MultiChoice reports uptick in revenue; sees slim subscriber growth Mr Price annual earnings jump on rebound from Covid lows

India:

Current account deficit likely to hit 3-year high at \$43.8 bn in FY22 Banks raise loan rates day after RBI's repo hike ADIA buys 20% in IIFL Home for Rs 2,200cr

Vietnam:

Over 24 trillion VND worth of business bonds issued in May Banks' asset quality to remain safe thanks to large reserve buffers Reference exchange rate up 3 VND on June 10

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,644.26	-0.7%	-2.0%	-4.1%	13.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,235.43	-0.01%	2.3%	0.8%	-14.1%	EGP/USD	18.71	0.1%	19.1%
India	16,478.10	0.7%	-0.6%	-0.6%	-5.0%	INR/USD	77.76	0.0%	4.6%
Kenya	1,683.41	-1.2%	-1.0%	0.1%	-11.5%	KES/USD	117.10	0.0%	3.5%
Nigeria	1,935.06	-0.05%	0.7%	-1.2%	12.4%	NGN/USD	418.75	0.9%	1.2%
Saudi Arabia	12,603.89	0.1%	-0.01%	-2.5%	11.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	62,427.08	-1.6%	-2.9%	-4.6%	-6.9%	ZAR/USD	15.38	0.4%	-3.6%
Vietnam	1,342.92	0.1%	1.2%	0.8%	-12.6%	VND/USD	23,185.00	0.0%	1.7%

MSCI Emerging Markets

MSCI Frontier	548.64	-0.3%	0.3%	0.0%	-17.6%	Brent Crude (\$)	123.07	-0.4%	58.2%
MSCI Frontier 100	1,274.55	-0.1%	0.1%	-0.4%	-16.9%	Gold (\$)	1,852.80	-0.2%	1.3%
MSCI Emerging	1,067.15	-0.6%	0.6%	-1.0%	-13.4%	Copper (\$)	9,615.00	-1.2%	-1.1%
MSCI World (USD)	2,721.85	-2.2%	-2.1%	-2.5%	-15.8%	Coffee (\$)	203.22	-0.5%	2.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	7.40	4.2%	57.4%	6.33	Zenith	22.85	-2.4%	-8.6%	290.71
Axamansard	2.13	2.9%	-4.5%	0.70	Wema	3.23	-1.8%	308.9%	6.16
Cadbury	17.00	2.1%	93.2%	11.30	UBA	7.70	-1.3%	-3.8%	148.61
Lafarge Africa	28.00	1.8%	18.1%	129.99	Nigerian Breweries	63.00	-1.1%	31.3%	68.94
Transnational Corporation	1.32	1.5%	33.3%	225.90	Ecobank	11.10	-0.9%	32.9%	16.36
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Transcorp Hotels	6.25	6.25	0.0%	0.27	Nestle	1400.00	1390.00	0.7%	678.54
Airtel Africa	1766.00	1767.00	-0.1%	2.52	Access	9.75	9.50	2.6%	79.99
BUA Cement	74.25	74.50	-0.3%	3.16	Zenith	22.85	22.00	3.9%	287.36
Seplat Petroleum	1289.50	1300.10	-0.8%	24.98	Stanbic IBTC	33.60	32.15	4.5%	23.58
UBN	6.50	6.80	-4.4%	3.28	Dangote Sugar	16.25	15.00	8.3%	18.42

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 Takaful	5.99	15.0%	-2.8%	0.02	Adc Acquisition Corporation Pjsc Warrants	2.56	-6.6%	241.3%	1.84
Gulf Cement	0.56	7.5%	-20.1%	0.02	Emirates Telecom	27.68	-2.2%	-12.7%	77.29
National Marine Dredging	26.88	4.0%	106.1%	13.61	Ghitha Holding P.J.S.C.	86.55	-1.6%	214.7%	49.85
Abu Dhabi National Energy	1.30	2.36%	-1.5%	1.90	Abu Dhabi Islamic Bank	8.34	-1.5%	21.4%	9.69
GFH FINANCIAL GROUP B.S.C	1.12	1.8%	-4.3%	2.77	Methaq Takaful Ins.	0.80	-1.2%	-1.2%	0.60
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	0.90	0.90	0.0%	1.46	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	6.04	5.80	4.1%	0.84
Sharjah Insurance	1.38	1.38	0.0%	0.00	Gulf Pharma Ind.	1.26	1.20	5.0%	0.03
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.01	Sudatel Telecom	0.34	0.32	5.3%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Eastern Company	11.47	4.8%	7.0%	4.99	Egyptian Financial Group-Hermes	13.82	-1.9%	-6.7%	18.29
MM Group For Industry And International Trade	2.82	2.9%	-59.0%	21.69	Palm Hills Develop. Company	1.28	-1.7%	-35.9%	6.75
GB AUTO	3.32	2.5%	-34.9%	6.25	Fawry For Banking Tech And Electronic Payment	4.24	-1.4%	-66.9%	8.42
Ibnsina Pharma	1.68	2.1%	-58.8%	8.06	Abu Dhabi Islamic Bank- Egypt	12.29	-1.4%	2.5%	3.26
Orascom Development Egypt	4.12	1.2%	-31.3%	13.99	Misr Fertilizers ProductionCompany	103.55	-1.4%	-59.0%	21.69
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	15.39	15.39	0.0%	6.68	Commercial International Bank	40.69	40.69	0.0%	62.00
Sidi Kerir Petrochemicals - SIDPEC	8.12	8.12	0.0%	3.35	Credit Agricole Egypt	5.99	5.99	0.0%	1.09
Oriental Weavers	6.84	6.84	0.0%	1.71	Fawry For Banking Tech And E Payment	4.24	4.24	0.0%	8.42
Misr Fertilizers Production Company	103.55	103.55	0.0%	1.62	GB AUTO	3.32	3.32	0.0%	6.25
Heliopolis Housing	4.72	4.72	0.0%	20.52	Ibnsina Pharma	1.68	1.68	0.0%	8.06

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Dr Reddys Lab	4324.95	3.0%	-11.9%	3187.245	Tata Steel	1041.35	-4.2%	-6.3%	10400.54
Bharat Petroleum	333.00	2.8%	-13.6%	2287.50	Shree Cement	19199.00	-2.0%	-28.9%	1167.42
Reliance Industries	2796.05	2.6%	18.1%	22038.84	Grasim Industries	1307.50	-1.6%	-19.4%	1774.68
Eicher Motors	2718.85	2.6%	4.9%	1424.24	Tata Motors	428.85	-1.6%	-11.1%	5606.95
Bajaj Auto	3874.55	2.1%	19.2%	2415.38	NTPC	155.40	-1.1%	24.9%	2156.55
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Reliance Industries	2796.05	2856.15	-2.1%	22038.84	Shree Cement	19199.00	19080.05	0.6%	1167.42
ITC	270.90	282.35	-4.1%	2660.18	Grasim Industries	1307.50	1297.50	0.8%	1774.68
Coal India	198.75	209.00	-4.9%	2103.05	Ultratech Cement	5475.00	5410.00	1.2%	2057.19
NTPC	155.40	166.35	-6.6%	2156.55	Asian Paints	2695.00	2599.35	3.7%	4959.01
Eicher Motors	2718.85	2994.00	-9.2%	1424.24	Divi's Laboratories	3504.00	3365.55	4.1%	2096.79

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	23.50	8.0%	-6.0%	1.19	Centum Investment Company Plc	9.48	-5.2%	-32.8%	1.92
Absa Bank Kenya	11.45	4.1%	-3.4%	84.34	WPP Scangroup Plc	3.42	-4.7%	-17.4%	0.06
Kenya Reinsurance Corporation Ltd	2.13	2.9%	-7.4%	0.09	Stanbic Holdings	94.50	-4.5%	8.3%	0.16
Safaricom Plc	26.60	0.6%	-29.9%	292.65	Nation Media Group	21.90	-3.5%	18.7%	1.02
KCB Group Plc	38.95	0.4%	-14.3%	2.76	Equity Group Holdings Plc	44.20	-2.8%	-16.2%	8.41
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)
Absa Bank Kenya	11.45	12.95	-11.6%	84.34	Centum Investment Company Plc	9.48	9.38	1.1%	1.92
NCBA Group Plc	25.45	29.00	-12.2%	1.13	Kengen Limited	3.41	3.35	1.8%	0.65
Stanbic Holdings	94.50	108.00	-12.5%	0.16	East African Breweries Limited	137.50	135.00	1.9%	14.73
Total Kenya Ltd	23.50	27.50	-14.5%	1.19	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	8.82
Bamburi Cement Limited	33.90	40.00	-15.3%	1.33	Diamond Trust Bank Limited	50.25	48.50	3.6%	6.66

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Rabigh Refining and Petrochemical Co.	20.80	9.9%	0.5%	168.77	Saudi Industrial Export Co.	90.20	-10.0%	138.2%	142.90
Al-Rajhi Company for Cooperative Insurance	88.40	6.1%	13.8%	49.44	Anaam International Holding Group	33.60	-4.3%	-58.9%	27.40
Al Hammadi Company for Development and Investment	56.50	5.0%	40.2%	36.44	AYYAN Investment Co	20.02	-3.8%	-1.6%	16.86
Taleem REIT Fund	12.60	3.8%	2.4%	4.80	SEDCO Capital REIT Fund	10.22	-3.6%	-14.8%	7.82
ACWA POWER Co.	150.00	3.5%	78.6%	61.03	Saudi Ceramic Co.	49.00	-3.4%	-11.1%	7.33
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.	93.20	93.20	0.0%	62.65	Naseej International Trading Co	21.22	21.22	0.0%	15.09
Nahdi Medical Co.	159.80	159.80	0.0%	36.42	Allied Cooperative Insurance Group	17.00	17.00	0.0%	5.97
Scientific and Medical Equipment House Co.	80.90	80.90	0.0%	30.82	Fawaz Abdulaziz Alhokair Co.	13.22	13.22	0.0%	32.86
Elm Co.	281.00	281.00	0.0%	115.44	National Shipping Co of Saudi Arabia	23.52	23.52	0.0%	16.15
Almunajem Foods Co.	66.40	66.40	0.0%	17.24	Tanmiah Food Co.	72.10	72.10	0.0%	7.62

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Bidvest Group Ltd/The	21608.00	1.6%	14.1%	21822.70	Anglo American Platinum Ltd	151223.00	-4.4%	-14.0%	19546.78
MultiChoice Group	13012.00	1.1%	6.6%	8482.69	Northam Platinum Ltd	16902.00	-4.1%	-19.3%	12875.15
Naspers Ltd	183603.00	0.7%	-25.7%	284645.24	Aspen Pharmacare Holdings Ltd	14153.00	-3.8%	-36.9%	11026.97
Capitec Bank Holdings Ltd	207470.00	0.5%	2.4%	35122.18	Reinet Investments	28613.00	-3.7%	0.0%	8171.10
Shoprite Holdings Ltd	21034.00	0.4%	0.7%	26186.28	SPAR Group Ltd/The	14227.00	-3.6%	-14.9%	26643.96
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)
Sasol Ltd	41986.00	43860.00	-4.3%	58696.89	Aspen Pharmacare Holdings Ltd	14153.00	14150.00	0.0%	11026.97
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	SPAR Group Ltd/The	14227.00	13800.00	3.1%	26643.96
British American Tobacco PLC	67350.00	71456.00	-5.7%	27864.24	Mr Price Group Ltd	19476.00	18650.00	4.4%	43339.14
Investec Ltd	9220.00	9830.56	-6.2%	3794.80	Northam Platinum	16902.00	16061.00	5.2%	12875.15
Investec PLC	9070.00	9684.15	-6.3%	5130.86	Sibanye Stillwater	4491.00	4246.00	5.8%	49691.52

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	15900.00	3.2%	-9.1%	359864.70	Vietcombank	77800.00	-1.8%	-1.3%	83051.50
Sai Gon Thuong Tin Commercial	22300.00	3.2%	-29.2%	358385.53	Saigon Beer Alcohol Beverage Corp.	157000.00	-1.7%	6.3%	17427.00
Hoa Phat Group JSC	33800.00	2.7%	-27.2%	911920.62	Vinamilk	70200.00	-1.1%	-17.4%	73366.02
Vietnam Rubber Group JSC	33800.00	2.7%	-27.2%	911920.62	Saigon Securities Inc	29000.00	-1.0%	-44.0%	231185.10
Vincom Retail	30900.00	1.6%	2.7%	44570.16	Petrovietnam Gas	127600.00	-1.0%	32.6%	165088.88
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	128500.00	131100.00	-2.0%	97621.45	Vietnam Rubber Group JSC	33800.00	32650.00	3.5%	911920.62
FPT Corp	115300.00	118900.00	-3.0%	196736.39	Hoa Phat Group JSC	33800.00	32650.00	3.5%	911920.62
Petrovietnam Gas	127600.00	132500.00	-3.7%	165088.88	Phat Dat Real Estate Development Corp	53200.00	50800.00	4.7%	96781.44
Mobile World Inv. Corp	152800.00	161747.66	-5.5%	172832.08	No Va Land Invest	76500.00	72500.00	5.5%	182360.70
Saigon Beer Alcohol Beverage Corp.	157000.00	181400.00	-13.5%	17427.00	Vingroup JSC	78100.00	72700.00	7.4%	120438.01

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