

# Daily Market Report

## 20 June 2022

### JSE

JSE All-Share fell by 3.13% to close at 65,390.88 points on Friday, as the Industrial, Financial and Resources sector recorded losses.

### BRVM

BRVM Composite Index closed at 210.43 points, up by 0.32% on Friday, with Sior Côte d'Ivoire and Setao Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share Index declined by 1.21% to close at 51,778.08 points on Friday, as the Banking, Consumer goods, Oil & Gas, Insurance, and Industrial sectors recorded losses.

### EGX

EGX 30 Index declined by 1.40% to close at 9,728.19 points on Sunday, as the market cap shed around LE 8.09 billion, amid foreign selling.

### ESG

Casablanca ESG 10 Index dropped by 1.70% to close at 907.95 points on Friday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 3.13%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.32%
<b>NSE</b> Nigerian Stock Exchange	▼ 1.21%
<b>EGX</b> Egyptian Stock Exchange	▼ 1.40%
<b>ESG</b> Casablanca Stock Exchange	▼ 1.70%

### African Markets

**Nigeria:** NSE 30 Index dropped by 1.76% and closed at 1,880.41 points on Friday. International Breweries and Ecobank were the top losers.

**Egypt:** EGX 30 Index declined by 1.40% to close at 9,728.19 points on Sunday, as the market cap shed around LE 8.09 billion, amid foreign selling.

**Kenya:** NSE 20 Index was down by 0.17% and closed at 1,626.81 points on Friday. Safaricom and Nation Media Group were the top losers.

**South Africa:** JSE Top 40 Index sank 3.40% to close at 59,082.87 points on Friday, as the Industrial, Financial and Resources sector recorded losses.

### Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.87
<b>INTERBANK RATES</b>	
OPR	10.33 ▼
Overnight	10.92 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.51% to close at 9,456.62 points on Friday, as losses in the Energy, Financials, Real Estate, Telecom, and Utilities sectors led shares lower. MSCI UAE declined by 1.09% to close at 442.67 points.

**Vietnam:** VN-30 Index dropped by 1.74% to close at 1,258.03 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.83% to close at 808.84 points.

**Saudi Arabia:** Tadawul All Share Index tumbled by 4.44% to close at 11,299.18 points on Sunday, as losses in the Media & Publishing, Financial Services and Building & Construction sectors led shares lower. MSCI Saudi Arabia fell by 4.55% to close at 1,571.36 points.

**India:** Nifty 50 Index decreased by 0.44% to close at 15,293.50 points on Friday, as losses in the Oil & Gas, Consumer Durables and Healthcare sectors led shares lower. MSCI India declined by 0.89% to close at 1,769.04 points.

### News

#### Nigeria:

Debt servicing doubles, hits N896bn in three months – DMO report  
NEPC eyes 40% increase in exports through trade houses  
FG's spending on pension, gratuity falls to N356bn

#### Kenya:

Kenya & Zambia Sign 6 MoUs to Enhance Bilateral Cooperation  
CBK Reports a 7.6% Rise in Diaspora Remittance to \$ 339.7m in May  
Microsoft to Invest in Kenya's Agritech

#### Abu Dhabi:

UAE In-Focus: \$50b investment pledged for climate change  
UAE to go ahead with second Dh1.5b 'T-Bond' auction  
Abu Dhabi's Chimera to buy majority stake in Egypt's Beltone in expansion push

#### Saudi Arabia:

Saudi Aramco awards contracts worth \$673m to Abu Dhabi's NPCC  
Saudi Arabia signs \$133m deal with DP World  
SABIC declares H1 dividends of \$1.8bn

#### Egypt:

Budget of new fiscal year exceeds LE 3T: Finance min.  
Egypt, Lebanon to sign deal on gas exportation on June 21  
Banking sector's allocations reach LE209.75B at end of March

#### South Africa:

Recovery in short-term lending in quarter to pre-Covid levels  
Momentum in retail sales in SA is expected to slow in the coming months  
RBPlat wins legal challenge to its R840m acquisition of Maseve mine

#### India:

5G roll out to begin in 20-25 cities, towns by year-end  
Forex reserves down by \$4.599 billion to \$596.458 billion  
Govt gets Rs 497cr from GAIL buyback

#### Vietnam:

VN to increase national fuel reserves  
Việt Nam to develop digital financial ecosystem  
NA approves extension of pilot bad debt settlement resolution

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,456.62	-0.5%	0.0%	-5.9%	11.4%	AED/USD	3.67	0.0%	0.0%
Egypt	9,728.19	-1.4%	-1.4%	-4.2%	-18.3%	EGP/USD	18.74	-0.1%	19.3%
India	15,293.50	-0.4%	0.0%	-7.8%	-11.9%	INR/USD	78.07	0.0%	5.0%
Kenya	1,626.81	-0.2%	0.0%	-3.3%	-14.5%	KES/USD	117.35	0.0%	3.7%
Nigeria	1,880.41	-1.8%	0.0%	-4.0%	9.2%	NGN/USD	415.00	-1.1%	0.3%
Saudi Arabia	11,299.18	-4.4%	-4.4%	-12.6%	-0.3%	SAR/USD	3.75	0.0%	-0.1%
South Africa	59,082.87	-3.4%	0.0%	-9.7%	-11.9%	ZAR/USD	16.00	-0.5%	0.2%
Vietnam	1,258.03	-1.7%	0.0%	-5.6%	-18.1%	VND/USD	23,230.00	0.0%	1.9%

## MSCI Emerging Markets

MSCI Frontier	519.50	-0.4%	0.0%	-5.3%	-22.0%	Brent Crude (\$)	113.12	-5.6%	45.4%
MSCI Frontier 100	1,204.76	-0.3%	0.0%	-5.8%	-21.4%	Gold (\$)	1,840.60	-0.5%	0.7%
MSCI Emerging	1,004.63	-0.3%	0.0%	-6.8%	-18.5%	Copper (\$)	8,961.50	-1.2%	-7.8%
MSCI World (USD)	2,485.77	-0.2%	0.0%	-10.9%	-23.1%	Coffee (\$)	204.06	1.45%	2.8%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	11.50	6.5%	19.8%	77.43	International Breweries	6.25	-9.4%	33.0%	47.72
Fidelity	3.37	3.4%	32.2%	14.02	Ecobank	10.10	-8.6%	21.0%	10.27
Axamansard	2.07	1.5%	-7.2%	5.42	MTNN	221.00	-5.6%	21.4%	296.91
Unilever	15.00	0.7%	11.9%	9.79	FBNH	9.70	-5.4%	-15.7%	88.69
					Access	9.30	-2.6%	2.2%	85.81
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%	0.02	Access	9.30	9.30	0.0%	84.45
BUA Cement	74.25	74.50	-0.3%	746.73	Zenith	21.40	21.25	0.7%	710.48
Seplat Petroleum	1289.50	1300.10	-0.8%	2.59	Nestle	1400.00	1390.00	0.7%	55.06
Airtel Africa	1745.00	1767.00	-1.2%	467.38	Cap	18.15	17.55	3.4%	1.14
Cadbury	17.25	17.85	-3.4%	10.64	Stanbic IBTC	33.55	32.15	4.4%	6.07

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
FERTIGLOBE PLC	5.51	5.0%	56.5%	364.29	Methaq Takaful Ins.	0.74	-7.9%	-9.0%	1.20
Abu Dhabi National Ins. Co	6.43	4.7%	-4.0%	1.05	Adc Acq Corp Pjsc Warrants	2.15	-4.0%	186.7%	0.70
PALMS SPORTS	12.28	4.2%	0.5%	0.04	Adc Acq Corp Pjsc Shares	11.94	-3.4%	9.1%	5.52
Q HOLDING PSC	4.00	4.2%	-9.3%	11.80	Sudatel Telecom	0.33	-2.9%	-4.9%	0.03
Abu Dhabi National Hotels	4.00	2.8%	5.8%	0.05	RESPONSE PLUS HOLDING	8.58	-2.7%	-11.1%	3.26
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	0.87	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	5.90	5.80	1.7%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	RAK Properties PJSC	0.63	0.62	2.4%	0.00
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	Sudatel Telecom	0.33	0.32	4.1%	0.00

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Abu Dhabi Islamic Bank-Egypt	11.52	3.5%	-26.9%	0.32	Citadel Capital - Common Shares	1.23	-4.7%	1.7%	8.66
Cleopatra Hospital Company	4.97	2.3%	1.0%	1.55	GB AUTO	3.00	-4.5%	-41.2%	4.37
Housing & Development Bank	36.23	0.5%	-17.8%	0.31	MM Group For Industry And International Trade	2.52	-4.2%	-63.4%	4.40
Tenth Of Ramadan Pharma Industries & Diagnostic	2.21	0.5%	-7.9%	3.47	Heliopolis Housing	4.86	-3.8%	-17.8%	0.31
Palm Hills Development	1.24	0.4%	-37.9%	1.43	T M G Holding	7.51	-3.0%	-10.1%	0.36
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	15.08	15.08	0.0%	0.36	Commercial International Bank	38.50	38.50	0.0%	59.41
Sidi Kerir Petrochemicals - SIDPEC	7.57	7.57	0.0%	1.45	Credit Agricole Egypt	5.49	5.49	0.0%	2.35
Oriental Weavers	6.46	6.46	0.0%	1.08	Fawry For Banking Tech And E Payment	4.15	4.15	0.0%	2.39
Misr Fertilizers Production Company - Mopco	99.69	99.69	0.0%	0.50	GB AUTO	3.00	3.00	0.0%	4.37
Heliopolis Housing	4.86	4.86	0.0%	8.19	Ibnsina Pharma	1.57	1.57	0.0%	2.80

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finserv	11788.00	2.8%	-28.1%	4898.458	Titan Company	1935.45	-6.1%	-23.3%	11854.04
Bajaj Finance	5428.00	2.7%	-22.2%	10390.10	Wipro	406.40	-3.8%	-43.2%	8464.68
Coal India	183.95	2.3%	26.0%	2778.54	Shree Cement	18027.00	-3.7%	-33.2%	1372.37
Jsw Steel	557.35	2.1%	-15.0%	3754.18	HDFC Life Insurance Company	551.80	-3.3%	-15.0%	2799.68
Reliance Industries	2605.05	1.8%	10.0%	29260.61	Bharat Petroleum	302.00	-3.1%	-21.7%	2115.38
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	263.50	282.35	-6.7%	4373.85	Shree Cement	18027.00	17980.20	0.3%	1372.37
Reliance Industries	2605.05	2856.15	-8.8%	29260.61	Ultratech Cement	5182.45	5157.05	0.5%	4276.05
Coal India	183.95	209.00	-12.0%	2778.54	Bharat Petroleum	302.00	299.75	0.8%	2115.38
Eicher Motors	2605.20	2994.00	-13.0%	2185.49	Asian Paints	2581.00	2560.00	0.8%	5307.30
Maruti Suzuki India	7684.15	9050.00	-15.1%	10170.37	Wipro	406.40	402.05	1.1%	8464.68

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	23.75	6.7%	-5.0%	0.08	Safaricom Plc	24.30	-3.0%	-36.0%	444.61
Centum Investment Company Plc	9.30	3.1%	-34.0%	0.98	Nation Media Group	20.00	-2.9%	8.4%	0.27
WPP Scangroup Plc	3.43	3.0%	-17.1%	0.02	Kenya Reinsurance Corporation Ltd	2.03	-2.4%	-11.7%	0.07
Nairobi Securities Exchange Plc	6.88	2.4%	-8.5%	0.04	Equity Group Holdings Plc	39.85	-1.6%	-24.5%	29.50
The Cooperative Bank of Kenya Ltd	11.00	0.9%	-15.1%	5.12	Bamburi Cement Limited	33.55	-1.3%	-11.7%	0.19
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	100.25	108.00	-7.2%	0.00	East African Breweries Limited	124.50	124.50	0.0%	10.47
Total Kenya Ltd	23.75	27.50	-13.6%	0.08	Equity Group Holdings Plc	39.85	39.55	0.8%	29.50
NCBA Group Plc	24.45	29.00	-15.7%	0.91	Safaricom Plc	24.30	24.10	0.8%	444.61
Bamburi Cement Limited	33.55	40.00	-16.1%	0.19	Standard Chartered Bank Kenya Ltd	123.75	121.00	2.3%	4.31
British American Tobacco Kenya Ltd	428.75	512.00	-16.3%	0.21	Kengen Limited	3.45	3.35	3.0%	0.37

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Gassim Investment Holding Co.	21.68	8.4%	-8.4%	9.96	Wafrah for Industry and Development	48.60	-10.0%	-66.4%	117.39
Saudi Airlines Catering Co.	75.70	1.9%	-2.8%	19.75	Anaam International Holding Group	22.82	-10.0%	-72.1%	114.30
Saudi Paper Manufacturing Co.	44.00	1.6%	-3.3%	5.67	Arab Sea Information System	88.10	-9.9%	-55.1%	11.40
Al Hassan Ghazi Ibrahim Shaker Co.	16.46	1.6%	-25.7%	25.01	Ataa Educational Co.	55.40	-9.9%	-4.3%	10.42
Saudi Arabian Cooperative Insurance Co.	21.48	1.4%	-2.1%	8.22	Saudi Industrial Export Co.	51.20	-9.9%	35.2%	6.34
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)
Elm Co.	237.20	237.20	0.0%	61.44	Al Kathiri Holding	42.10	42.10	0.0%	2.79
Saudi Tadawul Group Holding Co.	186.80	186.80	0.0%	54.26	Naseej International Trading Co	16.34	16.34	0.0%	6.06
ACWA POWER Co.	131.00	131.00	0.0%	111.20	Alkhabeer REIT Fund	7.88	7.88	0.0%	4.71
The Saudi National Bank	62.80	62.80	0.0%	193.12	Allied Cooperative Insurance Group	15.12	15.12	0.0%	1.52
Tourism Enterprise Co.	193.60	193.60	0.0%	18.53	Fawaz Abdulaziz Alhokair Co.	11.08	11.08	0.0%	6.88

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	15679.00	3.2%	-10.0%	82505.52	Sasol Ltd	37370.00	-8.4%	44.3%	207891.10
Impala Platinum Holdings Ltd	18227.00	1.1%	-19.0%	109153.70	Anglo American PLC	64696.00	-6.9%	0.3%	142698.80
Woolworths Holdings Ltd/South Africa	5473.00	0.2%	5.5%	49554.27	Glencore PLC	8988.00	-5.8%	10.8%	47731.96
Northam Platinum Ltd	17169.00	0.1%	-18.0%	30195.79	Reinet Investments SCA	26514.00	-4.8%	-7.3%	22933.52
					Investec PLC	8546.00	-4.5%	5.3%	15866.34
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	67079.00	71456.00	-6.1%	68503.56	SPAR Group Ltd/The	13586.00	13400.00	1.4%	15662.47
Bidvest Group Ltd/The	21071.00	23636.00	-10.9%	27849.54	Aspen Pharmacare Holdings Ltd	13737.00	13356.00	2.9%	42197.11
Investec Ltd	8701.00	9830.56	-11.5%	11313.41	Reinet Investments SCA	26514.00	25623.00	3.5%	22933.52
Investec PLC	8546.00	9684.15	-11.8%	15866.34	NEPI Rockcastle PLC	8916.00	8605.00	3.6%	30497.70
Capitec Bank Holdings Ltd	207500.00	237590.91	-12.7%	89244.30	Sanlam Ltd	5419.00	5229.00	3.6%	69931.13

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	117000.00	5.7%	-17.9%	190382.40	Saigon Securities Inc	20600.00	-7.0%	-60.2%	431326.92
Petrovietnam Gas	134000.00	4.7%	39.3%	208772.00	Military Commercial Bank	23300.00	-6.4%	-19.4%	487890.35
PetroVietnam Power Corp	16100.00	4.5%	-8.0%	610941.87	Tien Phong Commercial Joint Stock Bank	25500.00	-4.9%	-37.9%	81852.45
Vincom Retail	29350.00	0.5%	-2.5%	68981.31	Vietnam JSC Bank	23550.00	-4.7%	-30.5%	74224.89
Phu Nhuan Jewelry	122000.00	0.2%	27.5%	162382.00	Techcombank	34500.00	-4.3%	-31.0%	172324.05
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Petrovietnam Gas	134000.00	134000.00	0.0%	208772.00	Saigon Securities Inc	20600.00	20600.00	0.0%	431326.92
Mobile World Inv. Corp	77700.00	80873.83	-3.9%	271988.85	Military Commercial Bank	23300.00	23200.00	0.4%	487890.35
Phu Nhuan Jewelry	122000.00	131100.00	-6.9%	162382.00	Vietnam JSC Bank	23550.00	23050.00	2.2%	74224.89
FPT Corp	92000.00	99083.29	-7.1%	213568.80	Vietnam Prosperity	27900.00	27300.00	2.2%	350072.46
Saigon Beer Alcohol Beverage Corp.	156000.00	181400.00	-14.0%	23524.80	Vinamilk	66700.00	64500.00	3.4%	166936.76

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