

Daily Market Report

21 June 2022

JSE

JSE All-Share advanced by 1.47% to close at 66,350.31 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 210.33 points, down marginally by 0.05% on Monday, with Servair Abidjan Côte d'Ivoire and Bollore Transport & Logistics being the top losers.

NSE

NSE All-Share Index dropped by 1.97% to close at 50,756.74 points on Monday, as the Industrial, Consumer goods, Insurance, and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index decreased by 0.49% to close at 9,680.18 points on Monday, as the market cap shed around LE 2.78 billion, amid foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.83% to close at 915.51 points on Monday.

African Markets

Nigeria: NSE 30 Index fell by 2.43% and closed at 1,834.65 points on Monday. Dangote Cement and UBN were the top losers.

Egypt: EGX 30 Index decreased by 0.49% to close at 9,680.18 points on Monday, as the market cap shed around LE 2.78 billion, amid foreign selling.

Kenya: NSE 20 Index decreased by 0.66% and closed at 1,616.14 points on Monday. National Media Group and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index rose by 1.68% to close at 60,073.83 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.47%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.05%

NSE
Nigerian Stock Exchange ▼ 1.97%

EGX
Egyptian Stock Exchange ▼ 0.49%

ESG
Casablanca Stock Exchange ▲ 0.83%

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.82
INTERBANK RATES	
OPR	13.75 ▲
Overnight	14.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 1.08% to close at 9,354.32 points on Monday, as losses in the Consumer Staples, Energy, Financials, Industrials, Telecom, and Basic Materials sectors led shares lower. MSCI UAE declined by 1.43% to close at 436.32 points.

Vietnam: VN-30 Index fell by 2.58% to close at 1,225.56 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam tanked by 2.63% to close at 787.58 points.

Saudi Arabia: Tadawul All Share Index increased by 0.55% to close at 11,361.53 points on Monday, as gains in the Utilities, Food & Beverages and Consumer Services sectors led shares higher. MSCI Saudi Arabia increased by 0.68% to close at 1,581.99 points.

India: Nifty 50 Index increased by 0.37% to close at 15,350.15 points on Monday, as gains in the Fast Moving Consumer Goods, Technology and IT sectors led shares higher. MSCI India slipped by 0.04% to close at 1,768.30 points.

News

Nigeria:

Manufacturers reduce investment by 61%, borrowing cost hits 22%
Scarcity hits Lagos, Abuja, fuel sells N180/litre as NNPC cuts supplies
Nigeria's Oil Rigs Count Remains Unchanged in May

Kenya:

Kenyan Traders Set to Enhance Exports to China to Boost Revenue
Bamburi Cement Shareholders Approve KSh 1.3 bn Dividend Payout
Bear market raises bank dividend returns to 9.6pc

Abu Dhabi:

UAE to build Red Sea port in Sudan in \$6 billion investment package
UAE's ADIA invests \$590mln in Kotak's Indian real-estate fund
2nd auction of UAE's dirham treasury bonds oversubscribed 6.5 times

Saudi Arabia:

Saudi Arabia's oil exports hit 25-month high in April: JODI
Saudi entrepreneurs get \$27b funding as SMEs grow by 15% in Q1
Saudi PIF acquires 24% stake in Jordan's Capital Bank

Egypt:

Egypt, Chevron sign MoU for cooperation on East Mediterranean Gas
Egypt allocates land for DP World to establish logistics zone in early 2023
Egypt to be regional hub for capital investments - CBE

South Africa:

South Africa's economic activity bounces back strongly from floods
Freight industry and government sign agreement to stop N3 blockades
Glencore's trading profit is set to smash its previous record

India:

Adani Power acquires infra devpt firms SPPL and EREPL for over Rs 609 cr
Tata Steel buys coal from Russia weeks after vowing to cut ties
Sebi allows MFs to resume investing abroad with riders

Vietnam:

S. Korean investment into Việt Nam property market increases
Hoa Phat eyes \$5 bln seaport, industrial complex in central province
Finance ministry mulls further cut in fuel environment tax

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,354.32	-1.1%	-1.1%	-7.0%	10.2%	AED/USD	3.67	0.0%	0.0%
Egypt	9,680.18	-0.5%	-1.9%	-4.6%	-18.7%	EGP/USD	18.77	0.1%	19.4%
India	15,350.15	0.4%	0.4%	-7.4%	-11.5%	INR/USD	77.98	-0.1%	4.9%
Kenya	1,616.14	-0.7%	-0.7%	-3.9%	-15.1%	KES/USD	117.40	0.0%	3.8%
Nigeria	1,834.65	-2.4%	-2.4%	-6.3%	6.5%	NGN/USD	419.75	1.1%	1.5%
Saudi Arabia	11,361.53	0.6%	-3.9%	-12.1%	0.3%	SAR/USD	3.75	0.0%	-0.1%
South Africa	60,073.83	1.7%	1.7%	-8.2%	-10.4%	ZAR/USD	16.03	0.2%	0.5%
Vietnam	1,225.56	-2.6%	-2.6%	-8.0%	-20.2%	VND/USD	23,235.00	0.0%	2.0%

MSCI Emerging Markets

MSCI Frontier	515.64	-0.7%	-0.7%	-6.0%	-22.5%	Brent Crude (\$)	115.49	2.1%	48.5%
MSCI Frontier 100	1,191.64	-1.1%	-1.1%	-6.8%	-22.3%	Gold (\$)	1,840.55	-0.003%	0.7%
MSCI Emerging	1,000.42	-0.4%	-0.4%	-7.2%	-18.8%	Copper (\$)	8,977.50	0.2%	-7.6%
MSCI World (USD)	2,495.00	0.4%	0.4%	-10.6%	-22.8%	Coffee (\$)	202.23	-0.9%	1.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Zenith	22.00	2.8%	-12.0%	171.12	Dangote Cement	249.30	-10.0%	-3.0%	115.30
Access	9.40	1.1%	3.3%	206.36	UBN	5.40	-10.0%	-10.7%	5.96
Sterling	1.56	0.6%	4.0%	9.34	International Breweries	5.65	-9.6%	20.2%	27.83
					Flour Mills	32.00	-8.6%	12.9%	27.38
					FBNH	9.00	-7.2%	-21.7%	113.97
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%	592.07
BUA Cement	74.25	74.50	-0.3%	1.44	Access	9.40	9.30	1.1%	206.48
Seplat Petroleum	1289.50	1300.10	-0.8%	1.24	Cap	18.15	17.55	3.4%	1.47
Airtel Africa	1745.00	1767.00	-1.2%	84.49	Zenith	22.00	21.25	3.5%	172.30
Cadbury	17.25	17.85	-3.4%	12.89	Stanbic IBTC	33.55	32.15	4.4%	2.59

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Ain Ahlia Ins.	45.00	11.8%	34.0%	0.23	National Bank of Ras Al Khaimah	4.81	-9.9%	6.9%	0.02
RAK Co. for White Cement & Construction	2.12	3.4%	24.7%	0.23	Sudatel Telecom	0.30	-9.9%	-14.3%	0.06
Abu Dhabi National for Building Materials	0.20	1.0%	-21.3%	0.00	ADC ACQ CORP PJSC WARRANTS	1.94	-9.8%	158.7%	1.37
International Holding	280.80	0.1%	84.7%	313.03	Umm Al Qaiwain General Inv. Co	1.30	-5.1%	13.0%	0.13
					GHITHA HOLDING P.J.S.C.	76.10	-4.9%	176.7%	50.13
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	Invest Bank PSC	0.45		0.0%	0.00
Insurance House	0.87	0.87	0.0%	0.00	Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	5.81	5.80	0.2%	1.10
Sharjah Insurance	1.38	1.38	0.0%	0.00	National Bank of Fujairah	4.99	4.98	0.2%	0.00
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	RAK Properties PJSC	0.61	0.61	0.3%	1.19

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Medinet Nasr Housing	2.56	6.2%	-12.3%	31.22	Ezz Steel	12.06	-4.5%	-19.5%	15.04
Sidi Kerir Petrochemicals	7.67	1.3%	-1.7%	3.02	Cleopatra Hospital	4.80	-3.4%	-2.4%	25.50
T M G Holding	7.60	1.2%	-16.2%	11.10	Fawry For Banking Tech And E Payment	4.03	-2.9%	-68.5%	10.20
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.23	0.9%	-7.1%	3.25	Housing & Development Bank	35.23	-2.8%	-61.8%	3.14
Eastern Company	10.68	0.5%	-0.4%	43.55	E-finance For Digital and Financial Inv	14.01	-2.7%	-15.6%	109.54
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	14.94	14.94	0.0%	0.41	Commercial International Bank	38.50	38.50	0.0%	41.41
Sidi Kerir Petrochemicals	7.67	7.67	0.0%	3.02	Credit Agricole	5.46	5.46	0.0%	1.99
Oriental Weavers	6.46	6.46	0.0%	0.46	Fawry For Banking Tech And E Payment	4.03	4.03	0.0%	10.20
Misr Fertilizers Production Company - Mopco	99.79	99.79	0.0%	1.33	GB AUTO	2.95	2.95	0.0%	3.39
Heliopolis Housing	4.86	4.86	0.0%	8.23	Ibnsina Pharma	1.56	1.56	0.0%	3.14

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HDFC	2133.35	3.9%	-17.5%	12342.441	ONGC	134.60	-4.8%	-5.5%	3830.24
HUL	2190.65	3.8%	-7.2%	4413.40	Tata Steel	865.00	-4.6%	-22.2%	12048.97
Britannia Inds.	3378.00	3.1%	-6.3%	1226.71	UPL	641.00	-3.6%	-14.2%	1623.03
Wipro	417.85	3.1%	-41.6%	4251.64	Hindalco Industries	323.50	-3.1%	-32.0%	6552.53
Asian Paints	2657.95	3.0%	-21.4%	4199.55	Indusind Bank	785.40	-2.7%	-11.6%	2443.39
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	983.50	1057.95	-7.0%	3680.03	Bharat Petroleum	295.90	294.00	0.6%	1112.15
Reliance Industries	2542.90	2856.15	-11.0%	14216.99	Axis Bank	630.00	622.20	1.3%	3343.99
Eicher Motors	2626.60	2994.00	-12.3%	1892.23	Larsen & Toubro	1473.65	1447.25	1.8%	2700.18
Cipla	925.15	1083.00	-14.6%	863.39	Hcl Technologies	962.20	944.05	1.9%	1252.34
Bajaj Auto	3636.00	4259.65	-14.6%	968.32	Indusind Bank	785.40	769.50	2.1%	2443.39

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	7.00	1.7%	-6.9%	0.08	Nation Media Group	18.80	-6.0%	1.9%	0.06
Total Kenya Ltd	23.90	0.6%	-4.4%	0.03	Kenya Power & Lighting Limited	1.41	-3.4%	-19.4%	0.95
Safaricom Plc	24.35	0.2%	-35.8%	19.52	KCB Group Plc	36.80	-2.9%	-19.0%	2.02
Equity Group Holdings Plc	39.90	0.1%	-24.4%	3.52	Diamond Trust Bank Limited	50.50	-2.9%	-15.1%	0.07
					Bamburi Cement	32.85	-2.1%	-13.6%	0.76
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	100.00	108.00	-7.4%	0.03	East African Breweries Limited	124.00	123.00	0.8%	1.98
Total Kenya Ltd	23.90	27.50	-13.1%	0.03	Equity Group Holdings Plc	39.90	39.55	0.9%	3.52
NCBA Group Plc	24.45	29.00	-15.7%	0.55	Safaricom Plc	24.35	24.10	1.0%	19.52
Standard Chartered Bank Kenya Ltd	123.75	148.75	-16.8%	4.48	Centum Investment Company Plc	9.20	9.00	2.2%	0.16
Absa Bank Kenya	10.75	12.95	-17.0%	0.48	Standard Chartered Bank Kenya Ltd	123.75	121.00	2.3%	4.48

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Enaya Cooperative Insurance Co.	18.92	10.0%	-39.2%	6.48	Arab Sea Information System	79.30	-10.0%	-59.5%	7.36
Amana Cooperative Insurance Co.	15.06	9.9%	-56.2%	10.31	Saudi Industrial Export Co.	46.10	-10.0%	21.7%	8.75
Wataniya Insurance Co.	15.40	6.9%	-62.3%	5.42	Wafrah for Industry and Development	43.90	-9.7%	-69.7%	64.82
Arriyadh Development Co.	23.00	5.0%	-9.4%	17.13	Rabigh Refining and Petrochemical Co.	15.68	-6.9%	-24.3%	74.82
Leejam Sports Co.	92.30	4.8%	-15.3%	25.82	Saudi Tadawul Group Holding Co.	174.00	-6.9%	38.3%	125.88
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.	245.00	245.00	0.0%	105.64	Al Kathiri Holding	42.10	42.10	0.0%	2.25
Saudi Tadawul Group Holding Co.	174.00	174.00	0.0%	125.88	Naseej International Trading Co	16.36	16.36	0.0%	5.20
ACWA POWER Co.	135.80	135.80	0.0%	70.70	Alkhabeer REIT Fund	7.91	7.91	0.0%	1.50
The Saudi National Bank	63.40	63.40	0.0%	131.60	Allied Cooperative Insurance Group	15.22	15.22	0.0%	3.02
Tourism Enterprise Co.	190.00	190.00	0.0%	14.66	Fawaz Abdulaziz Alhokair Co.	11.42	11.42	0.0%	8.66

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Holdings Ltd	22056.00	4.4%	5.6%	26096.75	Northam Platinum	16469.00	-4.1%	-21.4%	8296.09
Glencore PLC	9374.00	4.3%	15.5%	18717.87	Impala Platinum Holdings Ltd	17500.00	-4.0%	-22.2%	55827.87
Sasol Ltd	38877.00	4.0%	50.1%	66964.74	Anglo American Platinum Ltd	143601.00	-1.9%	-18.3%	15480.91
Absa Group Ltd	16500.00	3.8%	8.2%	20970.10	Aspen Pharmacare Holdings Ltd	13628.00	-0.8%	-39.3%	5549.73
AngloGold Ashanti Ltd	26334.00	3.7%	-19.9%	30107.87	Sibanye Stillwater	4284.00	-0.4%	-12.7%	28090.78
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)
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Aspen Pharmacare Holdings Ltd	13628.00	13356.00	2.0%	5549.73
Bidvest Group Ltd/The	21534.00	23636.00	-8.9%	17777.26	Northam Platinum	16469.00	16059.00	2.6%	8296.09
Investec Ltd	8910.00	9830.56	-9.4%	3220.40	SPAR Group Ltd/The	13803.00	13400.00	3.0%	9435.65
Investec PLC	8760.00	9684.15	-9.5%	9116.65	NEPI Rockcastle PLC	9015.00	8605.00	4.8%	4216.89
Capitec Bank Holdings Ltd	213306.00	237590.91	-10.2%	57016.91	Sanlam Ltd	5495.00	5229.00	5.1%	12185.96

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vinamilk	69000.00	3.4%	-18.8%	178585.80	Petrovietnam Gas	124700.00	-6.9%	29.6%	214222.13
Vietjet Aviation	127000.00	1.7%	-1.0%	96456.50	Sai Gon Thuong Tin Commercial	18850.00	-6.9%	-40.2%	318466.98
					Vietnam Rubber Group JSC	21600.00	-6.9%	-38.5%	805094.64
					Hoa Phat Group JSC	21600.00	-6.9%	-38.5%	805094.64
					PetroVietnam Power Corp	15000.00	-6.8%	-14.3%	372411.00
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	124700.00	134000.00	-6.9%	214222.13	Bank for Inv. and Devp	29500.00	29500.00	0.0%	28691.70
FPT Corp	92000.00	99083.29	-7.1%	228518.80	Vietnam JSC Bank	22600.00	22600.00	0.0%	106986.14
Mobile World Inv. Corp	73900.00	80873.83	-8.6%	331323.26	Vietnam Rubber Group JSC	21600.00	21600.00	0.0%	805094.64
Phu Nhuan Jewelry	118000.00	131100.00	-10.0%	68628.80	Hoa Phat Group JSC	21600.00	21600.00	0.0%	805094.64
Vietjet Aviation	127000.00	149000.00	-14.8%	96456.50	Saigon Securities Inc	19200.00	19200.00	0.0%	350678.40

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