

Daily Market Report

23 June 2022

JSE

JSE All-Share dropped by 1.55% to close at 65,712.69 points on Wednesday, as the Industrial, Financial and Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 209.96 points, up by 0.11% on Wednesday, with Bank of Africa - Mali and Sicom Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.56% to close at 51,377.21 points on Wednesday, as the Consumer Goods sector recorded gains.

EGX

EGX 30 Index decreased by 0.88% to close at 9,612.9 points on Wednesday, as the market cap shed around LE 4.18 billion, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.79% to close at 904.72 points on Wednesday.

African Markets

Nigeria: NSE 30 Index increased by 0.38% and closed at 1,864.25 points on Wednesday. Presco and FBNH were the top gainers.

Egypt: EGX 30 Index decreased by 0.88% to close at 9,612.9 points on Wednesday, as the market cap shed around LE 4.18 billion, amid Arab and foreign selling.

Kenya: NSE 20 Index declined by 1.03% and closed at 1,580.51 points on Wednesday. Nation Media Group and Stanbic Holdings were the top losers.

South Africa: JSE Top 40 Index dropped by 1.59% to close at 59,414.81 points on Wednesday, as the Industrial, Financial and Resources sector recorded losses.

Capital Markets

JSE
Johannesburg Stock Exchange ▼ 1.55%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.11%

NSE
Nigerian Stock Exchange ▲ 0.56%

EGX
Egyptian Stock Exchange ▼ 0.88%

ESG
Casablanca Stock Exchange ▼ 0.79%

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.59
INTERBANK RATES	
OPR	14.00 ▲
Overnight	14.12 ▲

Other Emerging Markets

Abu Dhabi: ADX Index dropped by 1.78% to close at 9,301.87 points on Wednesday, as losses in the Consumer Discretionary, Energy, Financials, Industrials, Utilities and Basic Materials sectors led shares lower. MSCI UAE fell by 2.27% to close at 436.4 points.

Vietnam: VN-30 Index increased by 0.22% to close at 1,227.18 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam decreased by 0.37% to close at 781.95 points.

Saudi Arabia: Tadawul All Share Index fell by 2.91% to close at 11,319.88 points on Wednesday, as gains in the Diversified Financials, Materials and Pharma, Biotech & Life Science sectors led shares lower. MSCI Saudi Arabia tumbled by 3.25% to close at 1,570.61 points.

India: Nifty 50 Index dropped by 1.44% to close at 15,413.30 points on Wednesday, as losses in the Metals, Real Estate and Power sectors led shares lower. MSCI India decreased by 0.50% to close at 1,799.88 points.

News

Nigeria:

NGX transactions hit N1.51tn in five months
Access Holdings to acquire majority stake in First Guarantee Pension
Bolt stakes N3.5bn in ShopRite's new owner, Ketron investment

Kenya:

IMF to Delay Disbursing KSh28.7 Billion Loan to Kenya
Kenyan tea exports hit Sh41bn on good prices
World Bank shields Kenya from costly foreign debt

Abu Dhabi:

UAE public spending touches Dh11.35bn in Q1 2022
UAE's Pure Health commits \$2.72bn to local procurement over next 10 years
ADQ launches Growth Lab to support R&D in tech with \$27.2m investment

Saudi Arabia:

Saudi closes two tranches of SR-dominated Sukuk totaling \$1.5bn in June
Saudi to raise FinTech companies by threefold under new strategic plan
IMF sees Saudi economy growth unchanged at 7.6%

Egypt:

Egypt's CBE to review interest rates on Thursday
Ajan and Bros sign \$5bn worth investment partnership agreements in Egypt
Saudi Arabia to double its investments in Egypt: Madbouly

South Africa:

Inflation hits five-year high
Absa predicts half-year earnings will rise by more than 20%
Cell C recapitalisation gets the nod from bondholders

India:

India reports CAD of 1.2% of GDP in FY22 on widening trade deficit
Rupee hits life low of 78.39/\$ on foreign funds' selling spree
10-yr bond yield at over 3-week low, MPC minutes eyed

Vietnam:

HCM City posts economic growth of 3.82 percent in H1
Reference exchange rate up 12 VND on June 23
Việt Nam to grant FLEGT licence to wood exports in 2025

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,301.87	-1.8%	-1.6%	-7.5%	9.6%	AED/USD	3.67	0.0%	0.0%
Egypt	9,612.90	-0.9%	-2.6%	-5.3%	-19.3%	EGP/USD	18.76	0.1%	19.4%
India	15,413.30	-1.4%	0.8%	-7.1%	-11.2%	INR/USD	78.38	0.4%	5.4%
Kenya	1,580.51	-1.0%	-2.8%	-6.0%	-16.9%	KES/USD	117.60	0.1%	3.9%
Nigeria	1,864.25	0.4%	-0.9%	-4.8%	8.2%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	11,319.88	-2.9%	-4.3%	-12.4%	-0.1%	SAR/USD	3.75	0.0%	-0.1%
South Africa	59,414.81	-1.6%	0.6%	-9.2%	-11.4%	ZAR/USD	15.88	0.3%	-0.5%
Vietnam	1,227.18	0.2%	-2.5%	-7.9%	-20.1%	VND/USD	23,237.50	0.0%	2.0%

MSCI Emerging Markets

MSCI Frontier	514.92	-0.4%	-0.9%	-6.1%	-22.6%	Brent Crude (\$)	111.74	-2.5%	43.7%
MSCI Frontier 100	1,190.71	-0.3%	-1.2%	-6.9%	-22.3%	Gold (\$)	1,838.40	-0.02%	0.5%
MSCI Emerging	993.59	-2.3%	-1.1%	-7.8%	-19.4%	Copper (\$)	8,773.00	-2.5%	-9.7%
MSCI World (USD)	2,537.26	-0.2%	2.1%	-9.1%	-21.5%	Coffee (\$)	206.43	1.8%	4.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Presco	183.00	9.7%	108.4%	231.53	Ecobank	9.50	-5.9%	13.8%	13.77
FBNH	9.20	9.5%	-20.0%	35.41	BUA Cement	71.90	-3.2%	7.2%	70.17
Flour Mills	32.90	2.8%	16.0%	29.70	United Capital PLC	12.50	-2.0%	26.3%	30.70
Lafarge Africa	27.00	1.9%	13.9%	44.14	Fidelity	3.29	-1.8%	29.0%	29.91
Dangote Cement	275.00	1.9%	7.0%	212.25	Transnational Corporation	1.28	-0.8%	29.3%	13.55
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Transcorp Hotels	6.25	6.25	0.0%	0.22	Nascon	11.75	11.70	0.4%	0.83
Seplat Petroleum	1290.00	1300.10	-0.8%	15.85	Nestle	1400.00	1390.00	0.7%	101.26
Airtel Africa	1745.00	1767.00	-1.2%	64.06	Stanbic IBTC	32.50	32.15	1.1%	41.29
Cadbury	17.25	17.85	-3.4%	4.90	Access	9.50	9.30	2.2%	216.34
BUA Cement	71.90	74.50	-3.5%	74.41	Zenith	21.95	21.25	3.3%	318.89

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 for Building Materials	0.19	8.4%	-22.1%	0.01	Union Insurance Co	0.62	-10.0%	-11.3%	0.00
ARAM GROUP	3.27	7.6%	5.5%	0.00	Adc Acq Corp Pjsc Warrants	1.60	-9.6%	113.3%	0.64
Al Yah Satellite Communications Company	2.63	0.4%	-4.4%	1.87	Sudatel Telecom	0.31	-7.9%	-10.6%	0.03
International Holding	281.30	0.1%	85.1%	337.68	National Marine Dredging	25.12	-6.3%	92.6%	20.80
					Methaq Takaful Ins.	0.75	-5.7%	-7.4%	0.26
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	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	5.80	5.78	0.3%	0.54
Sharjah Insurance	1.38	1.38	0.0%	0.00	RAK Properties PJSC	0.60	0.59	1.2%	1.86
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	Sudatel Telecom	0.31	0.30	4.3%	0.02

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	11.19	1.2%	-29.0%	3.49	Medinet Nasr Housing	2.45	-3.2%	-16.1%	15.63
Palm Hills Development	1.24	0.7%	-38.0%	5.54	Heliopolis Housing	4.97	-2.4%	-25.9%	17.56
GB AUTO	2.99	0.7%	-41.4%	1.70	E-finance For Digital and Financial Investments	14.01	-2.2%	-31.0%	55.21
Housing & Development Bank	36.22	0.6%	-17.8%	0.88	Citadel Capital - Common Shares	1.21	-2.1%	-0.4%	0.23
					Orascom Construction PLC	62.04	-2.1%	-34.7%	1.74
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	14.46	14.46	0.0%	1.07	Commercial International Bank	38.40	38.40	0.0%	48.74
Sidi Kerir Petrochemicals	7.60	7.60	0.0%	3.12	Credit Agricole	5.42	5.42	0.0%	0.82
Oriental Weavers	6.40	6.40	0.0%	0.75	Fawry For Banking Technology And Electronic Payment	4.00	4.00	0.0%	16.52
Misr Fertilizers Production Company - Mopco	98.00	98.00	0.0%	6.10	GB AUTO	2.99	2.99	0.0%	1.70
Heliopolis Housing	4.97	4.97	0.0%	17.56	Ibnsina Pharma	1.56	1.56	0.0%	3.78

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	305.00	1.3%	-20.9%	2008.064	UPL	613.00	-6.3%	-17.9%	2592.62
Hero Motocorp	2521.00	0.9%	2.4%	2207.71	Hindalco Industries	319.25	-5.9%	-32.9%	6155.66
Divi's Laboratories Limited	3615.00	0.4%	-22.7%	1614.34	Tata Steel	836.80	-5.4%	-24.7%	9333.75
Tata Consultancy Svs.	3225.30	0.4%	-13.7%	10744.84	Jsw Steel	551.40	-4.3%	-15.9%	4696.99
Power Grid Corp Of India	210.60	0.1%	3.0%	1614.81	ONGC	134.60	-3.2%	-5.5%	4267.93
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	983.70	1057.95	-7.0%	2591.77	Tata Steel	836.80	835.70	0.1%	9333.75
Eicher Motors	2661.00	2994.00	-11.1%	730.62	UPL	613.00	611.00	0.3%	2592.62
Reliance Industries	2502.00	2856.15	-12.4%	12368.03	Axis Bank	627.40	621.25	1.0%	3696.56
Maruti Suzuki India	7780.00	9050.00	-14.0%	6218.65	Indusind Bank	776.00	767.70	1.1%	2385.45
Coal India	179.50	209.00	-14.1%	1190.78	Bajaj Finserv	11453.00	11265.05	1.7%	3260.77

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	34.45	4.9%	-9.3%	0.05	Nation Media Group	16.50	-7.8%	-10.6%	0.01
Diamond Trust Bank Limited	51.75	2.0%	-13.0%	0.75	Stanbic Holdings	95.75	-4.3%	9.7%	0.03
Standard Chartered Bank Kenya Ltd	124.00	0.2%	-3.3%	1.79	WPP Scangroup Plc	3.03	-4.1%	-26.8%	0.29
					NCBA Group Plc	23.95	-3.0%	-5.0%	0.47
					Total Kenya Ltd	23.40	-2.5%	-6.4%	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	95.75	108.00	-11.3%	0.03	East African Breweries Limited	118.75	118.00	0.6%	15.90
Bamburi Cement Limited	34.45	40.00	-13.9%	0.05	Safaricom Plc	23.45	23.30	0.6%	717.71
Total Kenya Ltd	23.40	27.50	-14.9%	0.05	Equity Group Holdings Plc	39.00	38.75	0.6%	11.00
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	1.79	Kenya Reinsurance Corporation Ltd	1.98	1.96	1.0%	0.06
British American Tobacco Kenya Ltd	424.50	512.00	-17.1%	8.45	Centum Investment Company Plc	9.10	9.00	1.1%	0.08

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arab Sea Information System Co.	74.80	4.8%	-61.8%	1279.36	National Gypsum Co.	20.90	-10.0%	-53.6%	58.90
Rabigh Refining and Petrochemical Co.	18.00	4.4%	-13.0%	138.78	Amana Cooperative Insurance Co.	14.14	-7.5%	-58.9%	11.41
Salama Cooperative Insurance Co.	13.98	3.9%	-17.8%	4.18	Saudi Arabian Mining Co.	51.00	-7.3%	-35.0%	161.97
Ataa Educational Co.	61.50	3.2%	6.2%	6.46	Dar Alarkan Real Estate Development	13.22	-6.9%	31.4%	530.01
Al Gassim Investment Holding Co.	21.22	3.0%	-10.3%	8.00	Sahara International Petrochemical Co.	47.50	-6.5%	13.1%	115.62
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.	257.00	257.00	0.0%	112.97	Al Kathiri Holding	41.80	41.80	0.0%	3.74
Saudi Tadawul Group Holding Co.	170.80	170.80	0.0%	98.32	Naseej International Trading Co	15.78	15.78	0.0%	7.94
ACWA POWER Co.	146.00	146.00	0.0%	218.71	Alkhabeer REIT Fund	8.03	8.03	0.0%	1.91
The Saudi National Bank	63.60	63.60	0.0%	237.14	Fawaz Abdulaziz Alhokair Co.	11.14	11.14	0.0%	5.50
Tourism Enterprise Co.	175.00	175.00	0.0%	43.61	Gulf General Cooperative Insurance Co.	8.99	8.99	0.0%	15.16

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Cie Financiere Richemont SA	16214.00	1.3%	-32.8%	61710.95	Sasol Ltd	36729.00	-7.6%	41.8%	97568.97
Investec Ltd	8788.00	0.9%	7.2%	17005.03	Glencore PLC	8870.00	-5.6%	9.3%	39825.30
					Bid Corp Ltd	30920.00	-4.0%	-5.3%	31061.80
					Vodacom Group Ltd	13144.00	-3.9%	-2.4%	13247.82
					Anglo American PLC	63157.00	-3.8%	-2.1%	67810.34
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	67789.00	71456.00	-5.1%	86742.06	Aspen Pharmacare Holdings Ltd	13526.00	13277.00	1.9%	8383.73
Bidvest Group Ltd/The	21374.00	23636.00	-9.6%	22292.25	Northam Platinum Ltd	16450.00	16059.00	2.4%	15157.57
Nedbank Group Ltd	22221.00	24625.00	-9.8%	28735.73	Sanlam Ltd	5393.00	5229.00	3.1%	19607.70
Investec Ltd	8788.00	9830.56	-10.6%	17005.03	Sibanye Stillwater Ltd	4268.00	4070.00	4.9%	26639.96
Investec PLC	8574.00	9684.15	-11.5%	18446.55	SPAR Group Ltd/The	14067.00	13400.00	5.0%	8517.44

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Securities Inc	17700.00	8.9%	-61.5%	210497.25	Petrovietnam Gas	111200.00	-6.9%	15.6%	209878.88
Sai Gon Thuong Tin Commercial	20500.00	6.8%	-34.9%	198642.95	PetroVietnam Power Corp	13000.00	-6.8%	-25.7%	486219.50
Techcombank	34800.00	5.5%	-30.4%	216045.36	FPT Corp	84500.00	-5.2%	9.0%	251083.30
Military Commercial Bank	23450.00	4.5%	-18.9%	245415.98	Mobile World Inv. Corp	69800.00	-5.0%	3.4%	266342.84
Vietnam Prosperity	28400.00	4.4%	-20.7%	200359.16	Masan Group Corp	106000.00	-4.5%	-25.6%	85086.20
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
Phu Nhuan Jewelry	116000.00	131100.00	-11.5%	79564.40	Vingroup JSC	75000.00	72700.00	3.2%	106417.50
Vietjet Aviation	129300.00	149000.00	-13.2%	120339.51	No Va Land Invest	75500.00	72500.00	4.1%	177123.00
Mobile World Inv. Corp	69800.00	80873.83	-13.7%	266342.84	Vietnam Rubber Group JSC	21500.00	20500.00	4.9%	461013.75
Saigon Beer Alcohol Beverage Corp.	156000.00	181400.00	-14.0%	21138.00	Hoa Phat Group JSC	21500.00	20500.00	4.9%	461013.75
FPT Corp	84500.00	99083.29	-14.7%	251083.30	Vietnam JSC Bank	23600.00	22500.00	4.9%	65431.00

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