

Daily Market Report

24 June 2022

JSE

JSE All-Share decreased by 0.63% to close at 65,295.42 points on Thursday, as the Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 209.40 points, down by 0.27% on Thursday, with Bank of Africa - Côte d'Ivoire and SGB Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index increased by 0.47% to close at 51,618.73 points on Thursday, as the Insurance, Oil & Gas, and Banking sectors recorded gains.

EGX

EGX 30 Index dropped by 1.80% to close at 9,439.85 points on Thursday, as the market cap shed around LE 7.05 billion, amid foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.74% to close at 898.01 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.63%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.27%

NSE Nigerian Stock Exchange ▲ 0.47%

EGX Egyptian Stock Exchange ▼ 1.80%

ESG Casablanca Stock Exchange ▼ 0.74%

African Markets

Nigeria: NSE 30 Index increased by 0.75% and closed at 1,878.23 points on Thursday. FBNH and UBN were the top gainers.

Egypt: EGX 30 Index dropped by 1.80% to close at 9,439.85 points on Thursday, as the market cap shed around LE 7.05 billion, amid foreign selling.

Kenya: NSE 20 Index decreased by 0.72% and closed at 1,569.10 points on Thursday. Bamburi Cement Limited and Stanbic Holdings were the top losers.

South Africa: JSE Top 40 Index decreased by 0.67% to close at 59,018.91 points on Thursday, as the Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.49
INTERBANK RATES	
OPR	13.83 ▼
Overnight	14.00 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.62% to close at 9,244.48 points on Thursday, as losses in the Consumer Discretionary, Energy, Financials, Real Estate, Telecom, Utilities and Basic Materials sectors led shares lower. MSCI UAE declined by 1.18% to close at 431.27 points.

Vietnam: VN-30 Index advanced by 1.09% to close at 1,240.58 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.81% to close at 788.29 points.

Saudi Arabia: Tadawul All Share Index edged down by 0.08% to close at 11,310.67 points on Thursday, as losses in the Energy & Utilities, Industrial Investment and Real Estate Development sectors led shares lower. MSCI Saudi Arabia was down by 0.12% to close at 1,568.74 points.

India: Nifty 50 Index increased by 0.93% to close at 15,556.65 points on Thursday, as gains in the Auto, IT and Technology sectors led shares higher. MSCI India climbed by 1.03% to close at 1,798.2 points.

News

Nigeria:

FG vows to boost trade agreements, enabling business environment
Oando's major shareholder to buy out minority investors
Firm issues N5.7bn commercial paper

Kenya:

Uhuru Allocates Ksh 49.2 Billion to the Fuel Subsidy Fund
KMRC to Float Second Tranche of its KSh 10.4b Bond in Mid-2023
PE funds, World Bank arm sells Naivas stake

Abu Dhabi:

Investment forum sees Dh110b commitment, 32 deals
UAE to offer long-term dollar bonds amid rising recession fears
FAB partners with Yale to launch global think tank and leadership platform

Saudi Arabia:

Saudi stock exchange approves listing of \$1.5bn government debt
Saudi Arabia's non-oil exports increase 37% to \$7.3bn in April
Competition authority signs off BinDawood's acquisition of e-comm

Egypt:

Egypt's central bank keeps interest rates on hold during June
Egypt's exports of cast iron, steel up 1% in 4 months
Egypt's exports of building materials up by 36% in 4 months

South Africa:

Shoprite launches Shoprite Next Capital to develop SMME partners
Northam granted the right to intervene in Implats-RBPlat merger hearings
Tiger Brands' Western Cape factory set to shed 4 500 jobs

India:

India aims to keep FY23 fiscal deficit at last year's level
Vodafone Idea defers Rs 8,837 crore AGR dues payment
Diagnostic chain to pump in over Rs 1,000 crore on expansion

Vietnam:

Central bank sold roughly \$7 billion to stabilise forex market
VN-Australia to further boost trade and investment ties
Việt Nam becomes major supplier of farm produce to UK

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,244.48	-0.6%	-2.2%	-8.1%	8.9%	AED/USD	3.67	0.0%	0.0%
Egypt	9,439.85	-1.8%	-4.3%	-7.0%	-20.7%	EGP/USD	18.75	-0.1%	19.4%
India	15,556.65	0.9%	1.7%	-6.2%	-10.4%	INR/USD	78.32	-0.1%	5.4%
Kenya	1,569.10	-0.7%	-3.5%	-6.7%	-17.5%	KES/USD	117.60	0.0%	3.9%
Nigeria	1,878.23	0.8%	-0.1%	-4.1%	9.1%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	11,310.67	-0.1%	-4.3%	-12.5%	-0.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	59,018.91	-0.7%	-0.1%	-9.8%	-12.0%	ZAR/USD	15.94	0.4%	-0.1%
Vietnam	1,240.58	1.1%	-1.4%	-6.9%	-19.2%	VND/USD	23,249.00	0.0%	2.0%

MSCI Emerging Markets

MSCI Frontier	514.70	0.0%	-0.9%	-6.2%	-22.7%	Brent Crude (\$)	110.05	-1.5%	41.5%
MSCI Frontier 100	1,192.15	0.1%	-1.0%	-6.8%	-22.2%	Gold (\$)	1,829.80	-0.5%	0.1%
MSCI Emerging	995.34	0.2%	-0.9%	-7.6%	-19.2%	Copper (\$)	8,409.00	-4.1%	-13.5%
MSCI World (USD)	2,549.05	0.5%	2.5%	-8.7%	-21.1%	Coffee (\$)	208.15	0.8%	4.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	10.10	9.8%	-12.2%	121.77	Presco	165.00	-9.8%	87.9%	383.18
UBN	6.00	6.2%	-0.8%	28.74	Transnational Corporation	1.25	-2.3%	26.3%	7.96
MTNN	229.50	3.8%	26.1%	372.92	Unilever	14.50	-2.0%	8.2%	4.31
Fidelity	3.39	3.0%	32.9%	12.48	United Capital PLC	12.25	-2.0%	23.7%	59.76
Ecobank	9.70	2.1%	16.2%	7.11	Zenith	21.60	-1.6%	-13.6%	205.01
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%	0.00	Nascon	11.75	11.70	0.4%	0.27
Seplat Petroleum	1290.00	1300.10	-0.8%	122.71	Nestle	1400.00	1390.00	0.7%	18.01
Airtel Africa	1732.40	1767.00	-2.0%	303.12	Stanbic IBTC	32.50	32.15	1.1%	1.10
Cadbury	17.25	17.85	-3.4%	3.74	Zenith	21.60	21.25	1.6%	202.52
BUA Cement	71.90	74.50	-3.5%	9.96	Access	9.50	9.30	2.2%	228.94

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sudatel Telecom	0.34	9.9%	-1.7%	0.07	National Corp for Tourism and Hotels	2.70	-10.0%	-10.0%	0.00
ADC ACQUISITION CORPORATION PJSC WARRANTS	1.65	3.1%	120.0%	0.88	Abu Dhabi Nat for Building Materials	0.18	-9.8%	-29.7%	0.00
ALPHA DHABI HOLDING PJSC	24.90	2.1%	-8.8%	113.03	ARAM GROUP	2.95	-9.8%	-4.8%	0.00
Abu Dhabi National Oil Co.	4.10	2.0%	-4.0%	60.18	Dana Gas PJSC	1.00	-5.7%	-5.7%	45.31
GFH FINANCIAL GROUP B.S.C	0.97	1.7%	-17.1%	0.98	Abu Dhabi Islamic Bank	7.28	-5.5%	6.0%	34.60
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	0.87	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	RAK Properties PJSC	0.59	0.58	1.0%	1.04
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	2.30
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	Waha Capital	1.39	1.33	4.7%	0.91

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	11.48	2.6%	-27.2%	8.95	MM Group For Industry And Internationall Trade	2.33	-4.9%	-66.1%	10.47
Tenth Of Ramadan Pharmaceutical Industries&Diagnostic-Rameda	2.20	0.9%	-8.3%	0.63	Medinet Nasr Housing	2.35	-4.1%	-19.5%	20.72
Alexandria Mineral Oils Company	3.50	0.6%	-4.4%	3.20	Commercial International Bank	37.26	-3.0%	-29.7%	54.10
					Orascom Development Egypt	3.81	-2.8%	-26.5%	0.66
					GB AUTO	2.91	-2.7%	-26.8%	5.17
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	14.19	14.19	0.0%	4.40	Commercial International Bank	37.26	37.26	0.0%	54.10
Sidi Kerir Petrochemicals - SIDPEC	7.50	7.50	0.0%	2.70	Credit Agricole Egypt	5.35	5.35	0.0%	1.20
Oriental Weavers	6.39	6.39	0.0%	0.66	E-finance For Digital and Financial Inv	13.80	13.80	0.0%	2.81
Misir Fertilizers Production Company - Mopco	97.89	97.89	0.0%	3.16	Fawry For Banking Tech And E Payment	3.93	3.93	0.0%	13.34
Heliopolis Housing	4.91	4.91	0.0%	5.17	GB AUTO	2.91	2.91	0.0%	1.37

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Maruti Suzuki India	8300.30	6.7%	11.8%	13631.455	Reliance Industries	2469.00	-1.5%	4.3%	22306.42
Hero Motocorp	2678.00	6.1%	8.8%	4864.58	Power Grid Corp Of India	208.15	-1.2%	1.8%	2046.46
Eicher Motors	2818.95	5.9%	8.8%	3720.81	Coal India	177.35	-1.1%	21.4%	1654.86
Mahindra & Mahindra	1028.00	4.5%	22.8%	7348.13	NTPC	136.20	-1.1%	9.5%	1543.17
Bajaj Auto	3780.00	4.0%	16.3%	4421.89	Grasim Industries	1317.90	-0.5%	-18.8%	1092.20
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	266.35	282.35	-5.7%	2403.55	Tata Steel	840.75	827.00	1.7%	9383.95
Eicher Motors	2818.95	2994.00	-5.8%	3720.81	Axis Bank	630.50	618.25	2.0%	5319.17
Maruti Suzuki India	8300.30	9050.00	-8.3%	13631.45	Bajaj Finserv	11566.00	11265.05	2.7%	2916.48
Hero Motocorp	2678.00	2995.00	-10.6%	4864.58	Larsen & Toubro	1496.05	1456.35	2.7%	2741.55
Bajaj Auto	3780.00	4259.65	-11.3%	4421.89	Hindalco Industries	318.00	308.95	2.9%	5978.69

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	17.05	3.3%	-7.6%	0.08	Bamburi Cement Limited	33.00	-4.2%	-13.2%	0.77
Kenya Power & Lighting Limited	1.41	0.7%	-19.4%	0.18	Stanbic Holdings	92.50	-3.4%	6.0%	0.01
The Cooperative Bank of Kenya Ltd	10.75	0.5%	-17.0%	1.41	Absa Bank Kenya	10.30	-2.8%	-13.1%	1.20
Kengen Limited	3.40	0.3%	-18.9%	1.61	Nairobi Securities Exchange Plc	6.76	-2.0%	-10.1%	0.01
Total Kenya Ltd	23.45	0.2%	-6.2%	0.03	Diamond Trust Bank Limited	51.00	-1.4%	-14.3%	0.01
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	92.50	108.00	-14.4%	0.01	East African Breweries Limited	117.75	117.75	0.0%	31.22
Total Kenya Ltd	23.45	27.50	-14.7%	0.03	Equity Group Holdings Plc	39.00	38.75	0.6%	41.61
Standard Chartered Bank Kenya Ltd	124.25	148.75	-16.5%	0.16	Safaricom Plc	23.50	23.30	0.9%	11.82
Bamburi Cement Limited	33.00	40.00	-17.5%	0.77	Centum Investment Company Plc	9.10	9.00	1.1%	0.10
NCBA Group Plc	23.85	29.00	-17.8%	0.10	Kengen Limited	3.40	3.35	1.5%	1.61

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Fisheries Co.	31.35	10.0%	-31.1%	32.85	National Medical Care Co.	54.70	-6.3%	-12.6%	45.74
Tihama Advertising and Public Relations Co.	95.00	10.0%	151.7%	17.33	Saudi Pharma Ind and Med Appliances	25.95	-5.6%	-34.1%	12.19
United Cooperative Assurance Co.	29.60	9.8%	-12.8%	6.18	Al Moammar Info Systems Co.	85.20	-5.3%	-43.7%	11.65
National Gypsum Co.	22.00	5.3%	-51.1%	90.11	The Company for Coop Insurance	54.60	-4.4%	-29.5%	42.86
Derayah REIT Fund	10.70	5.1%	-15.7%	7.85	The Mediterranean and Gulf Insurance and Reinsurance Co.	12.48	-3.9%	-27.4%	4.37
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.	260.60	260.60	0.0%	104.25	Al Kathiri Holding	42.45	42.45	0.0%	2.25
Saudi Tadawul Group Holding Co.	169.00	169.00	0.0%	77.04	Naseej International Trading Co	16.30	16.30	0.0%	4.91
ACWA POWER Co.	141.80	141.80	0.0%	98.84	Alkhabeer REIT Fund	8.06	8.06	0.0%	1.62
The Saudi National Bank	63.40	63.40	0.0%	121.88	Fawaz Abdulaziz Alhokair Co.	11.20	11.20	0.0%	5.00
United Cooperative Assurance Co.	29.60	29.60	0.0%	6.18	Gulf General Co-op Insurance Co.	8.85	8.85	0.0%	5.43

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Prosus NV	85272.00	1.8%	-34.9%	57990.59	Anglo American PLC	60627.00	-4.0%	-6.0%	82216.52
FirstRand Ltd	6730.00	1.4%	10.7%	74882.90	Bid Corp Ltd	30108.00	-2.6%	-7.8%	33758.32
Vodacom Group Ltd	13325.00	1.4%	-1.0%	15228.32	Glencore PLC	8643.00	-2.6%	6.5%	29993.12
Naspers Ltd	184888.00	1.2%	-25.2%	116450.60	Gold Fields Ltd	15138.00	-2.4%	-13.1%	48819.11
Northam Platinum Ltd	16639.00	1.1%	-20.6%	19120.29	Anglo American Platinum Ltd	141254.00	-2.2%	-19.7%	33599.52
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	67656.00	71456.00	-5.3%	30748.43	Aspen Pharmacare Holdings Ltd	13287.00	13221.00	0.5%	8318.53
Bidvest Group Ltd	21479.00	23636.00	-9.1%	10004.17	Sanlam Ltd	5368.00	5229.00	2.7%	14657.58
Nedbank Group Ltd	22098.00	24625.00	-10.3%	20542.39	SPAR Group Ltd/The	13830.00	13400.00	3.2%	5635.24
Investec Ltd	8730.00	9830.56	-11.2%	15338.31	Northam Platinum	16639.00	16059.00	3.6%	19120.29
Woolworths Holdings	5688.00	6449.00	-11.8%	18269.71	Sibanye Stillwater	4221.00	4070.00	3.7%	22863.15

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam JSC Bank	25250.00	7.0%	-25.5%	117894.78	Vinhomes	63200.00	-2.5%	-20.7%	349761.44
PetroVietnam Power Corp	13900.00	6.9%	-20.6%	243711.48	Saigon Beer Alcohol Beverage Corp.	153400.00	-1.7%	3.8%	3604.90
Petrovietnam Gas	116800.00	5.0%	21.4%	130080.16	Vincom Retail	28050.00	-1.6%	-6.8%	22479.27
Saigon Securities Inc	18500.00	4.5%	-59.8%	253400.05	Vingroup JSC	74200.00	-1.1%	-22.0%	114928.38
Phu Nhuan Jewelry	120500.00	4.4%	26.6%	65708.65	Khang Dien House Trading & Investment	38100.00	-1.0%	-25.3%	17964.15
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	120500.00	130421.95	-7.6%	65708.65	Vingroup JSC	74200.00	72700.00	2.1%	114928.38
Mobile World Inv. Corp	72500.00	80873.83	-10.4%	355830.00	No Va Land Invest	74900.00	72500.00	3.3%	218228.64
Petrovietnam Gas	116800.00	134000.00	-12.8%	130080.16	Vietcombank	75900.00	72386.80	4.9%	44796.18
FPT Corp	85500.00	99083.29	-13.7%	172923.75	Vietnam Rubber Group JSC	21800.00	20500.00	6.3%	150991.16
Vietjet Aviation	128200.00	149000.00	-14.0%	87522.14	Hoa Phat Group JSC	21800.00	20500.00	6.3%	150991.16

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