

Daily Market Report

27 June 2022

JSE

JSE All-Share advanced by 1.61% to close at 66,348.75 points on Friday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 207.83 points, down by 0.75% on Friday, with Bollore Transport & Logistics and Servair Abidjan Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index was up by 0.17% to close at 51,705.61 points on Friday, as the Banking sector recorded gains.

EGX

EGX 30 Index inched up by 0.04% to close at 9,443.75 points on Sunday, amid Egyptian buying.

ESG

Casablanca ESG 10 Index increased by 0.80% to close at 905.19 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.61%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.75%
NSE Nigerian Stock Exchange	▲	0.17%
EGX Egyptian Stock Exchange	▲	0.04%
ESG Casablanca Stock Exchange	▲	0.80%

African Markets

Nigeria: NSE 30 Index marginally increased by 0.04% and closed at 1,879.05 points on Friday. International Breweries and FBNH were the top gainers.

Egypt: EGX 30 Index inched up by 0.04% to close at 9,443.75 points on Sunday, amid Egyptian buying.

Kenya: NSE 20 Index increased by 0.27% and closed at 1,573.32 points on Friday. Cement Investment Company and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index jumped by 1.65% to close at 59,992.87 points on Friday, as the Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.50
INTERBANK RATES	
OPR	14.00 ▲
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index declined marginally by 0.07% to close at 9,244.48 points on Friday, as losses in the Financials, Industrials, and Real Estate sectors led shares lower. MSCI UAE inched down by 0.01% to close at 431.21 points.

Vietnam: VN-30 Index decreased by 0.41% to close at 1,235.47 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam slipped by 0.05% to close at 787.92 points.

Saudi Arabia: Tadawul All Share Index rose by 1.79% to close at 11,513.01 points on Sunday, as gains in the Building & Construction, Industrial Investment and Cement sectors led shares higher. MSCI Saudi Arabia climbed by 1.87% to close at 1,598.04 points.

India: Nifty 50 Index increased by 0.92% to close at 15,699.25 points on Friday, as gains in the Auto, Power and Consumer Durables sectors led shares higher. MSCI India increased by 0.97% to close at 1,815.56 points.

News

Nigeria:

Buhari approves, releases ₦41.6bn for presidential power programme
 'Monthly forex inflows down 37% to \$4.36b over TSA'
 DisCos' payment to GenCos drops by 50%, consumers kick

Kenya:

CBK Collects KSh 19.6B from June T-Bonds Tap Sale
 IFC investment in Equity at Sh52bn after buying shares
 Proparco of France buys Sh3.7bn Naivas Supermarket stake

Abu Dhabi:

UAE and Germany to explore collaboration on clean energy
 UAE'S energy group Taqa issues \$8.25bn bonds on ADX
 UAE's EGA to develop silicon metal manufacturing unit

Saudi Arabia:

Saudi Arabia injects 50 billion riyals in liquidity-starved banks
 Saudi-Italian forum to explore opportunities to boost bilateral trade
 Saudi Exchange to allow single-stock futures trading on selected shares in July

Egypt:

Planning Ministry signs 5 cooperation protocols to support entrepreneurship
 Egypt's chemical industry exports rise by 33% to \$3.5bn
 Etisalat Egypt rebrands into 'etisalat by e&'

South Africa:

Steinhoff posts 13% rise in HY core profit
 Tongaat Hulett abandons planned R5bn rights offer
 SA firms expect trade activity for next six months to deteriorate

India:

Adani to foray into copper, ties up Rs 6k cr loan for plant
 Zomato to buy Blinkit for Rs 4.5k cr in all-stock deal
 GST compensation cess levy extended till March 2026

Vietnam:

SBV to tighten lending with stricter standards
 Can Tho posts three-year high economic growth
 RoK's investment into Vietnam property market increases

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,238.34	-0.1%	0.0%	-8.1%	8.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,443.75	0.04%	0.04%	-7.0%	-20.7%	EGP/USD	18.78	0.1%	19.5%
India	15,699.25	0.9%	0.0%	-5.3%	-9.5%	INR/USD	78.34	0.0%	5.4%
Kenya	1,573.32	0.3%	0.0%	-6.5%	-17.3%	KES/USD	117.75	0.1%	4.1%
Nigeria	1,879.05	0.04%	0.0%	-4.0%	9.1%	NGN/USD	419.75	1.1%	1.5%
Saudi Arabia	11,513.01	1.8%	1.8%	-10.9%	1.6%	SAR/USD	3.75	0.0%	-0.1%
South Africa	59,992.87	1.7%	0.0%	-8.3%	-10.5%	ZAR/USD	15.82	-0.8%	-0.9%
Vietnam	1,235.47	-0.4%	0.0%	-7.3%	-19.6%	VND/USD	23,252.00	0.0%	2.0%

MSCI Emerging Markets

MSCI Frontier	515.81	0.2%	0.0%	-6.0%	-22.5%	Brent Crude (\$)	113.12	2.8%	45.4%
MSCI Frontier 100	1,193.89	0.1%	0.0%	-6.7%	-22.1%	Gold (\$)	1,830.30	0.03%	0.1%
MSCI Emerging	1,011.18	1.6%	0.0%	-6.2%	-17.9%	Copper (\$)	8,381.00	-0.3%	-13.8%
MSCI World (USD)	2,619.48	2.8%	0.0%	-6.1%	-18.9%	Coffee (\$)	202.76	-2.6%	2.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	6.00	5.3%	27.7%	6.37	FCMB	3.30	-5.7%	10.7%	16.85
FBNH	10.55	4.5%	-8.3%	61.34	Nigerian Breweries	60.00	-4.0%	25.0%	142.37
United Capital PLC	12.70	3.7%	28.3%	39.50	P Z Cussons	12.50	-3.8%	104.9%	9.96
Sterling	1.53	0.7%	2.0%	9.53	Dangote Sugar	16.00	-0.9%	-3.0%	43.21
MTNN	230.10	0.3%	26.4%	239.09	Flour Mills	32.50	-0.8%	14.6%	25.53
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%	0.06	Nascon	11.75	11.70	0.4%	0.08
Seplat Petroleum	1290.00	1300.10	-0.8%	194.98	Nestle	1400.00	1390.00	0.7%	8.19
Airtel Africa	1732.40	1767.00	-2.0%	0.68	Stanbic IBTC	32.50	32.15	1.1%	3.50
Cadbury	17.25	17.85	-3.4%	10.00	Zenith	21.65	21.25	1.9%	178.45
BUA Cement	71.90	74.50	-3.5%	8.68	Access	9.50	9.30	2.2%	85.30

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	0.20	11.4%	-21.7%	0.02	National Marine Dredging	24.06	-3.8%	84.5%	10.69
APEX INVESTMENT P.S.C	4.87	3.8%	-27.3%	5.05	Ghitha Holding P.J.S.C.	73.20	-3.2%	166.2%	49.94
Q HOLDING PSC	3.80	2.7%	-13.8%	3.40	Esg Emirates Stallions Group	6.76	-3.2%	-15.5%	10.80
Easylease motorcycle rentals	35.88	2.5%	23.7%	13.60	Rak Properties	0.57	-2.9%	-26.0%	2.38
Gulf Pharmaceutical Ind.	1.30	2.4%	-29.3%	0.13	Methaq Takaful Ins.	0.73	-2.4%	-9.8%	0.11
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	5.78	5.76	0.3%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.20	1.14	5.3%	0.00
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	Insurance House	0.87	0.81	7.7%	0.00

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	8.9%	-12.3%	68.54	GB AUTO	2.72	-6.5%	-46.7%	8.18
Abu Dhabi Islamic Bank-Egypt	12.23	6.5%	-22.4%	12.04	MM Group For Industry & Internationall Trade	2.21	-5.2%	-67.9%	10.10
Heliopolis Housing	5.04	2.7%	-24.9%	20.11	E-finance For Digital and Fin Investments	13.39	-3.0%	-34.0%	4.29
Palm Hills Development Company	1.25	2.0%	-37.2%	5.88	Fawry For Banking Tech And E Payment	3.84	-2.3%	-46.7%	8.18
Ezz Steel	12.01	1.6%	-19.9%	6.23	Telecom Egypt	13.96	-1.6%	-7.1%	0.75
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	13.96	13.96	0.0%	3.15	Commercial International Bank	37.70	37.70	0.0%	48.85
Sidi Kerir Petrochemicals - SIDPEC	7.51	7.51	0.0%	1.24	Credit Agricole Egypt	5.37	5.37	0.0%	0.70
Oriental Weavers	6.40	6.40	0.0%	0.45	E-finance For Digital and Fin Investments	13.39	13.39	0.0%	4.29
Misir Fertilizers Production Company - Mopco	96.80	96.80	0.0%	0.75	Fawry For Banking Tech And E Payment	3.84	3.84	0.0%	15.80
Heliopolis Housing	5.04	5.04	0.0%	20.11	GB AUTO	2.72	2.72	0.0%	8.18

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1072.50	4.4%	28.1%	7700.723	Tech Mahindra	980.75	-1.0%	-45.2%	3987.34
Hero Motocorp	2750.00	2.8%	11.7%	3712.67	Infosys	1441.30	-0.8%	-23.6%	8817.25
Indusind Bank	806.55	2.8%	-9.2%	3792.94	Apollo Hospitals Enterprise Ltd	3824.00	-0.7%	-23.9%	3929.10
Bajaj Finance	5581.00	2.4%	-20.0%	7236.81	NTPC	135.70	-0.6%	9.1%	2973.80
HUL	2302.80	2.2%	-2.4%	4434.94	Tata Consultancy Svs.	3295.05	-0.4%	-11.9%	7038.89
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Eicher Motors	2870.00	2994.00	-4.1%	3094.88	Hcl Technologies	967.85	944.05	2.5%	1861.59
ITC	266.00	282.35	-5.8%	1868.02	Axis Bank	634.00	618.25	2.5%	4392.33
Maruti Suzuki India	8360.00	9050.00	-7.6%	9611.94	Bajaj Finserv	11585.55	11265.05	2.8%	4239.44
Hero Motocorp	2750.00	2995.00	-8.2%	3712.67	Larsen & Toubro	1498.00	1456.35	2.9%	2595.84
Bajaj Auto	3824.50	4259.65	-10.2%	2128.97	Tata Steel	851.80	827.00	3.0%	7289.47

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	9.46	4.0%	-32.9%	0.42	East African Breweries Limited	115.25	-2.1%	-30.2%	43.55
Nairobi Securities Exchange Plc	6.98	3.3%	-7.2%	0.08	Nation Media Group	16.75	-1.8%	-9.2%	0.17
Kenya Reinsurance Corporation Ltd	2.00	1.0%	-13.0%	0.03	Safaricom Plc	23.10	-1.7%	-39.1%	834.95
The Cooperative Bank of Kenya Ltd	10.85	0.9%	-16.2%	2.05	Diamond Trust Bank Limited	50.25	-1.5%	-15.5%	0.66
Kenya Power & Lighting Limited	1.42	0.7%	-18.9%	0.28	Stanbic Holdings	91.50	-1.1%	4.9%	0.02
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)
Total Kenya Ltd	23.30	27.50	-15.3%	0.17	Safaricom Plc	23.10	23.00	0.4%	834.95
Stanbic Holdings	91.50	108.00	-15.3%	0.02	East African Breweries Limited	115.25	114.75	0.4%	43.55
Standard Chartered Bank Kenya Ltd	125.00	148.75	-16.0%	0.99	Equity Group Holdings Plc	39.00	38.75	0.6%	205.46
Bamburi Cement Limited	32.90	40.00	-17.8%	0.15	Kengen Limited	3.40	3.35	1.5%	0.81
NCBA Group Plc	23.85	29.00	-17.8%	0.71	Kenya Reinsurance Corporation Ltd	2.00	1.95	2.6%	0.03

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabia Refineries Co.	89.10	10.0%	-35.2%	68.11	Dar Alarkan Real Estate Dev. Co.	12.40	-6.2%	23.3%	292.75
National Gypsum Co.	24.20	10.0%	-46.2%	55.80	Taleem REIT Fund	12.64	-1.9%	2.8%	1.61
Saudi Advanced Industries Co.	33.05	10.0%	-30.4%	136.22	Mouwasat Medical Services Co.	216.60	-1.6%	24.6%	7.04
Saudi Fisheries Co.	34.45	9.9%	-24.3%	50.96	Saudi Real Estate	14.54	-1.1%	-28.4%	31.40
Al Alamiya for Cooperative Insurance Co.	18.32	9.2%	-19.8%	4.70	United International Transportation Co.	45.75	-1.0%	-1.7%	20.74
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.	259.40	259.40	0.0%	111.19	Naseej International Trading Co	17.04	17.04	0.0%	6.06
Saudi Tadawul Group Holding Co.	171.00	171.00	0.0%	53.28	Allied Cooperative Insurance Group	15.24	15.24	0.0%	2.42
ACWA POWER Co.	146.00	146.00	0.0%	62.11	National Shipping Co. of Saudi Arabia	19.92	19.92	0.0%	21.69
The Saudi National Bank	63.90	63.90	0.0%	77.40	Saudi Arabian Fertilizer Co.	41.90	41.90	0.0%	47.25
United Cooperative Assurance Co.	30.00	30.00	0.0%	1.87	Saudi Industrial Export Co.	39.40	39.40	0.0%	126.61

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	16905.00	3.8%	-30.0%	45670.21	AngloGold Ashanti	24385.00	-2.1%	-25.8%	41147.22
Aspen Pharmacare Holdings	13783.00	3.7%	-38.6%	13291.68	Exxaro Resources	19468.00	-1.0%	27.4%	16395.72
Old Mutual Ltd	1162.00	3.7%	-11.3%	20600.40	Anglo American PLC	60068.00	-0.9%	-6.9%	87120.22
Naspers Ltd	191277.00	3.5%	-22.6%	128556.89	Gold Fields Ltd	15002.00	-0.9%	-13.9%	67097.44
Investec PLC	8827.00	3.4%	8.8%	7710.86	Sibanye Stillwater	4202.00	-0.5%	-14.4%	52547.16
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)
Bidvest Group Ltd/The	21593.00	23636.00	-8.6%	14850.18	Sibanye Stillwater	4202.00	4070.00	3.2%	52547.16
Investec Ltd	8963.00	9830.56	-8.8%	6066.34	Aspen Pharmacare Holdings Ltd	13783.00	13221.00	4.3%	13291.68
Investec PLC	8827.00	9684.15	-8.9%	7710.86	Northam Platinum	16797.00	16059.00	4.6%	18315.13
Nedbank Group Ltd	22398.00	24625.00	-9.0%	29779.17	Sanlam Ltd	5494.00	5229.00	5.1%	23107.43
Woolworths Holdings	5719.00	6449.00	-11.3%	26808.02	SPAR Group Ltd/The	14210.00	13400.00	6.0%	9468.54

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
BaoViet Holdings	54800.00	4.0%	-2.1%	127125.04	PetroVietnam Power Corp	13550.00	-2.5%	-22.6%	150219.37
Saigon Beer Alcohol Beverage Corp.	155600.00	1.4%	5.3%	13070.40	Petrovietnam Gas	114000.00	-2.4%	18.5%	91884.00
Phu Nhuan Jewelry	122000.00	1.2%	28.2%	85875.80	Ho Chi Minh City Devp	23000.00	-2.1%	-25.4%	51593.60
Vinamilk	71500.00	1.1%	-15.9%	120434.60	Vietnam JSC Bank	24750.00	-2.0%	-27.0%	72888.75
Khang Dien House Trading & Investment	38450.00	0.9%	-24.6%	24815.63	Tien Phong Comm. Joint Stock Bank	26000.00	-1.9%	-36.7%	23563.80
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	122000.00	130421.95	-6.5%	85875.80	No Va Land Invest	74000.00	72000.00	2.8%	287460.40
Mobile World Inv. Corp	71900.00	80873.83	-11.1%	195309.16	Vietcombank	75000.00	72386.80	3.6%	48645.00
FPT Corp	85500.00	99083.29	-13.7%	77155.20	Vingroup JSC	74600.00	72000.00	3.6%	113004.08
Vietjet Aviation	128300.00	149000.00	-13.9%	79674.30	Vietnam Prosperity	28150.00	26500.00	6.2%	101545.50
Saigon Beer Alcohol Beverage Corp.	155600.00	181400.00	-14.2%	13070.40	Vietnam Rubber Group JSC	21800.00	20500.00	6.3%	279667.84

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