

Daily Market Report

28 June 2022

JSE

JSE All-Share rose by 2.23% to close at 67,826.75 points on Monday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 208.02 points, up by 0.09% on Monday, with Servair Abidjan Côte d'Ivoire and Bernabe Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.50% to close at 51,962.85 points on Monday, as the Insurance, Banking, and Oil & Gas sectors recorded gains.

EGX

EGX 30 Index dropped by 1.99% to close at 9,255.43 points on Monday, as the market cap shed around LE 9.66 billion, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index inched up by 0.02% to close at 905.40 points on Monday.

African Markets

Nigeria: NSE 30 Index increased by 0.72% and closed at 1,892.52 points on Monday. Ecobank and Okomu Oil were the top gainers.

Egypt: EGX 30 Index dropped by 1.99% to close at 9,255.43 points on Monday, as the market cap shed around LE 9.66 billion, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.61% and closed at 1,563.68 points on Monday. Nairobi Securities Exchange and East African Breweries were the top losers.

South Africa: JSE Top 40 Index surged by 2.55% to close at 61,524.81 points on Monday, as the Industrial and Resources sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 2.23%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.09%

NSE

Nigerian Stock Exchange ▲ 0.50%

EGX

Egyptian Stock Exchange ▼ 1.99%

ESG

Casablanca Stock Exchange ▲ 0.02%

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.50
INTERBANK RATES	
OPR	13.75 ▼
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.32% to close at 9,267.64 points on Monday, as gains in the Consumer Staples, Financials, Industrials, Real Estate, and Basic Materials sectors led shares higher. MSCI UAE was up by 0.16% to close at 431.9 points.

Vietnam: VN-30 Index advanced by 1.72% to close at 1,256.67 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam jumped by 1.99% to close at 803.6 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.74% to close at 11,427.26 points on Monday, as losses in the Real Estate Development, Agriculture & Food and Hotels & Tourism sectors led shares lower. MSCI Saudi Arabia decreased by 0.50% to close at 1,590.09 points.

India: Nifty 50 Index increased by 0.85% to close at 15,832.05 points on Monday, as gains in the Capital Goods, IT and Technology sectors led shares higher. MSCI India increased by 0.86% to close at 1,831.13 points.

News

Nigeria:

FG Partners Brazil to Mechanise Nigeria's Agricultural Sector
NGX to provide SMEs access to investors
NNPC may acquire 10% equity in African Refineries Port Harcourt

Kenya:

Shilling tumble inflates foreign debt by Sh69bn
Kenya seals deal for cheaper Saudi fuel
Jubilee Allianz Gen Insurance, Allianz Kenya Merger Get Regulatory Nod

Abu Dhabi:

UAE producing close to maximum oil capacity based on Opec+ baseline
Abu Dhabi entity signs 25-year solar deal in Libya
Abu Dhabi's Chimera Capital launches two US Sharia-compliant ETFs

Saudi Arabia:

OPEC+ trims 2022 market surplus projection to 1m bpd-report
Aramco launches research hub to help hit net-zero emissions by 2050
Petro Rabigh's rights issue yields \$2.1bn in proceeds amid 91% capital hike

Egypt:

Egypt's budget deficit hits LE 436.6B during 11 months
Egypt's expenditures increased by 11.2% in 11 months
Tax revenues record LE 816B in 11 months

South Africa:

Prosus to cut \$134bn Tencent stake to fund buyback
Discovery announces secondary listing on A2X
PPC reports decline in profit despite revenue uptick

India:

Bajaj Auto to discuss share buyback decision at board meet today
Private banks treble share in small business loan to 70%
Economy shows spark on pent-up demand after re-openings

Vietnam:

Macquarie Group to invest \$3 billion in Hải Phòng wind farm
Tê Giác Trắng oil field reaches production milestone of 100 mn barrels
Reference exchange rate down 10 VND on June 28

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,267.64	0.3%	0.3%	-7.8%	9.2%	AED/USD	3.67	0.0%	0.0%
Egypt	9,255.43	-2.0%	-2.0%	-8.8%	-22.3%	EGP/USD	18.78	0.0%	19.5%
India	15,832.05	0.8%	0.8%	-4.5%	-8.8%	INR/USD	78.35	0.0%	5.4%
Kenya	1,563.68	-0.6%	-0.6%	-7.0%	-17.8%	KES/USD	117.75	0.0%	4.1%
Nigeria	1,892.52	0.7%	0.7%	-3.4%	9.9%	NGN/USD	419.75	0.0%	1.5%
Saudi Arabia	11,427.26	-0.7%	1.0%	-11.6%	0.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,524.81	2.6%	2.6%	-6.0%	-8.2%	ZAR/USD	15.84	0.1%	-0.7%
Vietnam	1,256.67	1.7%	1.7%	-5.7%	-18.2%	VND/USD	23,247.50	0.0%	2.0%

MSCI Emerging Markets

MSCI Frontier	520.94	1.0%	1.0%	-5.1%	-21.7%	Brent Crude (\$)	115.09	1.7%	48.0%
MSCI Frontier 100	1,207.99	1.2%	1.2%	-5.6%	-21.2%	Gold (\$)	1,824.80	-0.3%	-0.2%
MSCI Emerging	1,027.55	1.6%	1.6%	-4.7%	-16.6%	Copper (\$)	8,417.50	0.4%	-13.4%
MSCI World (USD)	2,623.20	0.1%	0.1%	-6.0%	-18.8%	Coffee (\$)	198.14	-2.3%	-0.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	10.65	9.8%	27.5%	8.10	P Z Cussons	11.25	-10.0%	84.4%	12.35
Okomu Oil	210.00	8.5%	47.9%	60.99	Nigerian Breweries	57.95	-3.4%	20.7%	40.71
International Breweries	6.30	5.0%	34.0%	7.00	UBN	5.85	-2.5%	-3.3%	25.70
FBNH	10.90	3.3%	-5.2%	143.50	Axamansard	2.00	-2.0%	-10.3%	2.49
Stanbic IBTC	33.55	3.2%	-6.8%	11.13	Transnational Corporation	1.23	-1.6%	24.2%	39.66
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%	0.05	Nascon	11.75	11.70	0.4%	0.89
Seplat Petroleum	1290.00	1300.10	-0.8%	417.98	Nestle	1400.00	1390.00	0.7%	33.19
Airtel Africa	1732.40	1767.00	-2.0%	85.65	Access	9.40	9.30	1.1%	275.12
Okomu Oil	210.00	215.00	-2.3%	64.03	Zenith	21.70	21.25	2.1%	257.36
Cadbury	17.25	17.85	-3.4%	2.94	Cap	18.15	17.55	3.4%	0.04

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Esg Emirates Stallions Group P.J.S.C	7.10	5.0%	-11.3%	12.84	RAK Co. for White Cement & Cons.	1.83	-8.5%	7.6%	0.00
National Marine Dredging	25.12	4.4%	92.6%	45.30	National Corp for Tourism and Hotels	2.50	-7.4%	-16.7%	0.00
Abu Dhabi Ports Company	5.16	3.8%	42.5%	36.15	PALMS SPORTS	11.08	-6.7%	-9.3%	1.01
Alpha Dhabi Holding Pjsc	25.70	3.6%	-5.9%	125.83	Ras Al Khaimah Poultry	2.00	-4.8%	-14.2%	0.02
Chimera S&P Ksa Shariah Etf-Share Class B-Income	3.56	2.3%	-3.8%	0.03	Dana Gas PJSC	0.99	-3.0%	-6.7%	17.66
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	National Bank of Fujairah	4.99	4.98	0.2%	0.00
Insurance House	0.87	0.87	0.0%	0.00	Du	5.80	5.76	0.7%	0.28
National Bank of Fujairah	4.99	4.99	0.0%	0.00	RAK Properties PJSC	0.56	0.56	0.9%	3.62
Sharjah Insurance	1.38	1.38	0.0%	0.00	Waha Capital	1.40	1.33	5.5%	0.17
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.00	Palms Sports PJSC	11.08	10.50	5.5%	1.04

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Oriental Weavers	6.45	0.8%	-25.8%	4.01	GB AUTO	2.42	-11.0%	-52.5%	18.74
Eastern Company	10.31	0.6%	-3.8%	3.23	Fawry For Banking Tech & Electronic Payment	3.47	-9.6%	-72.9%	89.54
					Orascom Development Egypt	3.50	-7.2%	-41.7%	3.96
					Orascom Construction PLC	56.20	-6.7%	-41.7%	3.96
					Abu Dhabi Islamic Bank- Egypt	11.53	-5.7%	-5.2%	2.98
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	13.95	13.95	0.0%	3.68	Commercial International Bank	37.39	37.39	0.0%	246.13
Sidi Kerir Petrochemicals - SIDPEC	7.45	7.45	0.0%	4.07	Credit Agricole Egypt	5.22	5.22	0.0%	2.08
Oriental Weavers	6.45	6.45	0.0%	4.01	E-finance For Digital and Fin Investments	13.26	13.26	0.0%	1.34
Misr Fertilizers Production Company - Mopco	95.27	95.27	0.0%	1.69	Fawry For Banking Tech And E Payment	3.47	3.47	0.0%	89.54
Heliopolis Housing	4.87	4.87	0.0%	6.94	GB AUTO	2.42	2.42	0.0%	18.74

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ONGC	141.90	3.3%	-0.4%	3400.640	Eicher Motors	2836.00	-1.5%	9.4%	1527.79
Coal India	182.10	3.1%	24.7%	1276.79	Apollo Hospitals Enterprise Ltd	3791.35	-1.2%	-24.6%	2704.94
Larsen & Toubro	1539.20	3.0%	-18.8%	3662.79	HDFC Life Insurance Company	558.90	-0.5%	-14.0%	1537.87
Hcl Technologies	992.80	2.7%	-24.7%	3617.68	Kotak Mahindra Bank	1693.55	-0.3%	-5.7%	3606.36
UPL	657.95	2.7%	-11.9%	1609.55	Britannia Inds.	3463.00	-0.2%	-4.0%	1455.03
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	270.00	282.35	-4.4%	2199.59	Bajaj Finserv	11580.00	11265.05	2.8%	2876.78
Eicher Motors	2836.00	2994.00	-5.3%	1527.79	Axis Bank	637.50	618.25	3.1%	2906.66
Maruti Suzuki India	8425.00	9050.00	-6.9%	7810.28	Kotak Mahindra Bank	1693.55	1626.00	4.2%	3606.36
Hero Motocorp	2760.00	2968.95	-7.0%	2789.04	Tata Steel	867.00	827.00	4.8%	6337.72
Bajaj Auto	3855.00	4250.00	-9.3%	7031.41	Hcl Technologies	992.80	944.05	5.2%	3617.68

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	9.66	2.1%	-31.5%	0.03	Nairobi Securities Exchange Plc	6.60	-5.4%	-12.2%	0.54
Nation Media Group	17.05	1.8%	-7.6%	0.29	East African Breweries Limited	110.00	-4.6%	-33.3%	314.00
Bamburi Cement Limited	33.35	1.4%	-12.2%	0.73	Total Kenya Ltd	22.55	-3.2%	-9.8%	0.12
British American Tobacco Kenya Ltd	423.75	0.7%	-4.0%	0.59	Stanbic Holdings	90.00	-1.6%	3.2%	0.09
Absa Bank Kenya	10.25	0.5%	-13.5%	0.90	Kenya Power & Lighting Limited	1.40	-1.4%	-20.0%	2.88
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)
Standard Chartered Bank Kenya Ltd	124.50	148.75	-16.3%	10.26	East African Breweries Limited	110.00	110.00	0.0%	314.00
Bamburi Cement Limited	33.35	40.00	-16.6%	0.73	Equity Group Holdings Plc	39.00	38.75	0.6%	70.48
Stanbic Holdings	90.00	108.00	-16.7%	0.09	Safaricom Plc	23.15	23.00	0.7%	105.96
British American Tobacco Kenya Ltd	423.75	512.00	-17.2%	0.59	Kengen Limited	3.38	3.35	0.9%	0.24
NCBA Group Plc	23.95	29.00	-17.4%	0.17	Kenya Reinsurance Corporation Ltd	1.98	1.95	1.5%	0.03

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Omran Industrial & Trading Co	85.20	9.9%	-21.3%	22.09	Dar Alarkan Real Estate Dev Co.	11.16	-10.0%	10.9%	457.77
Saudi Arabian Amiantit Co.	34.00	4.6%	89.9%	16.34	Arab Sea Information System	68.10	-9.9%	-65.3%	133.21
Saudi Steel Pipe Co.	20.10	3.0%	-20.2%	12.76	Saudi Industrial Export Co.	35.50	-9.9%	-6.3%	117.62
Etihad Atheeb Telecommunication Co.	43.10	2.6%	46.6%	47.87	Saudi Fisheries Co.	31.90	-7.4%	-29.9%	114.78
Al Kathiri Holding Co.	45.55	2.5%	-34.8%	13.34	Al Hammadi for Development & Investment	34.10	-7.1%	-15.4%	8.86
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.	252.60	252.60	0.0%	97.70	Naseej International Trading Co	16.70	16.70	0.0%	8.04
Saudi Tadawul Group Holding Co.	175.00	175.00	0.0%	63.22	Allied Cooperative Insurance Group	14.90	14.90	0.0%	2.32
ACWA POWER Co.	143.00	143.00	0.0%	41.94	Fawaz Abdulaziz Alhokair Co.	11.40	11.40	0.0%	9.37
The Saudi National Bank	64.20	64.20	0.0%	144.75	Gulf General Coop Insurance Co.	8.85	8.85	0.0%	3.72
United Cooperative Assurance Co.	27.95	27.95	0.0%	10.87	Gulf Union Alahlia	9.38	9.38	0.0%	0.77

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	234869.00	22.8%	-5.0%	827629.97	Absa Group Ltd	15799.00	-4.0%	3.6%	67694.61
Prosus NV	103948.00	18.2%	-20.6%	371420.65	FirstRand Ltd	6721.00	-2.4%	10.5%	114420.49
Exxaro Resources Ltd	20514.00	5.4%	34.2%	11883.43	Nedbank Group Ltd	21930.00	-2.1%	25.3%	17279.77
Gold Fields Ltd	15622.00	4.1%	-10.3%	35793.28	Standard Bank Group Ltd	16311.00	-1.2%	16.5%	37164.21
AngloGold Ashanti Ltd	25181.00	3.3%	-23.4%	28012.25	Discovery Ltd	13558.00	-1.1%	-5.6%	20490.67
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)
Investec Ltd	9028.00	9830.56	-8.2%	5445.13	Sibanye Stillwater	4205.00	4070.00	3.3%	46932.79
Investec PLC	8878.00	9684.15	-8.3%	14237.70	Northam Platinum	16701.00	16059.00	4.0%	8543.06
Bidvest Group Ltd/The	21421.00	23636.00	-9.4%	16834.34	Sanlam Ltd	5483.00	5229.00	4.9%	19938.22
Nedbank Group Ltd	21930.00	24625.00	-10.9%	17279.77	NEPI Rockcastle PLC	9153.00	8605.00	6.4%	6584.49
Clicks Group Ltd	29267.00	32943.00	-11.2%	18266.03	SPAR Group Ltd/The	14300.00	13400.00	6.7%	7543.24

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	19850.00	6.7%	-56.9%	275827.66	Vingroup JSC	73800.00	-1.1%	-22.4%	134493.12
No Va Land Invest	78800.00	6.5%	-13.4%	313521.56	Vinamilk	71100.00	-0.6%	-16.3%	128285.73
Phu Nhuan Jewelry	129500.00	6.1%	36.1%	261887.85	Mobile World Inv. Corp	71500.00	-0.6%	5.9%	225954.30
Hoa Phat Group JSC	22900.00	5.0%	-34.8%	474936.84	Vietcombank	74900.00	-0.1%	-4.9%	64601.25
Vietnam Rubber Group JSC	22900.00	5.0%	-34.8%	474936.84					
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	129500.00	130421.95	-0.7%	261887.85	Vingroup JSC	73800.00	72000.00	2.5%	134493.12
Vietjet Aviation	133000.00	149000.00	-10.7%	128212.00	Vietcombank	74900.00	72386.80	3.5%	64601.25
Mobile World Inv. Corp	71500.00	80873.83	-11.6%	225954.30	Ho Chi Minh City Devp	23350.00	21500.00	8.6%	29610.14
FPT Corp	86500.00	99083.29	-12.7%	108540.20	Asia Commercial JS Bank	23950.00	22000.00	8.9%	58620.02
Saigon Beer Alcohol Beverage Corp.	156800.00	181400.00	-13.6%	15538.88	Vietnam Prosperity	28900.00	26500.00	9.1%	169723.92

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