

Daily Market Report

30 June 2022

JSE

JSE All-Share decreased by 0.46% to close at 67,747.44 points on Wednesday, as the Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 206.94 points, down by 0.38% on Wednesday, with Sicom Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index inched down by 0.003% to close at 51,802.48 points on Wednesday, as the Banking sector recorded losses.

EGX

EGX 30 Index increased by 0.50% to close at 9,225.61 points on Wednesday, as the market cap gained around LE 1.92 billion, amid Egyptian and Arab purchases.

ESG

Casablanca ESG 10 Index decreased marginally by 0.07% to close at 910.30 points on Wednesday.

African Markets

Nigeria: NSE 30 Index marginally decreased by 0.04% and closed at 1,886.28 points on Wednesday. Ecobank and United Capital were the top losers.

Egypt: EGX 30 Index increased by 0.50% to close at 9,225.61 points on Wednesday, as the market cap gained around LE 1.92 billion, amid Egyptian and Arab purchases.

Kenya: NSE 20 Index rose by 1.39% and closed at 1,600.67 points on Wednesday. Stanbic Holdings and Safaricom Plc were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.38% to close at 61,553.81 points on Wednesday, as the Financial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.46%

BRVM

Bourse Régionale des Valeurs Mobilières

▼ 0.38%

NSE

Nigerian Stock Exchange

▼ 0.003%

EGX

Egyptian Stock Exchange

▲ 0.50%

ESG

Casablanca Stock Exchange

▼ 0.07%

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.77
INTERBANK RATES	
OPR	14.00 ↔
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.37% to close at 9,408.02 points on Wednesday, as losses in the Consumer Discretionary, Financials, Industrials, and Basic Materials sectors led shares lower. MSCI UAE declined by 0.99% to close at 435.73 points.

Vietnam: VN-30 Index slipped by 0.001% at 1,273.40 points on Wednesday, as blue chip stocks recorded losses. MSCI Vietnam inched up by 0.05% to close at 803.72 points.

Saudi Arabia: Tadawul All Share Index increased by 0.48% to close at 11,727.19 points on Wednesday, as gains in the Building & Construction, Retail and Petrochemicals sectors led shares higher. MSCI Saudi Arabia increased by 0.59% to close at 1,637.27 points.

India: Nifty 50 Index decreased by 0.32% to close at 15,799.10 points on Wednesday, as losses in the Banking, IT and Fast Moving Consumer Goods sectors led shares lower. MSCI India decreased by 0.38% to close at 1,829.16 points.

News

Nigeria:

FG targets N3.96tn revenue from oil, non-oil sectors
NGX Signs MoU with BOI to Deepen Capital Market
EU sets new rules for Nigerian carriers, others for in-bound freight

Kenya:

Government Raises Revenue Limit in New Finance Act
Govt targets to raise Sh60bn from infrastructure bond tap sale
Kenya To Implement AfCFTA Strategy To Boost Country's Trade

Abu Dhabi:

Adia and US fund GIP to buy majority stake in railcar lessor VTG
UAE and Germany to boost clean energy management and development
ADEX signs financing pact with West African 15-member group

Saudi Arabia:

Saudi Cabinet approves new companies law to drive entrepreneurship
Saudi foreign direct investment inflows rise 9.5% in first quarter
Saudi Arabia to launch \$2.3bn utility infrastructure projects

Egypt:

World Bank approves \$500M in development financing for Egypt
SCZone discusses green hydrogen with int'l companies
IFC lends EISewedy Electric \$150M to develop solar energy projects

South Africa:

SA consumer confidence plunges
Motus secures ESG funding facilities worth R6.8bn
Small businesses and SA take a hammering as Eskom power cuts bite

India:

Government approves deregulation of domestically produced crude oil
Sebi clears FPI trades in commodities derivatives
India's Lenskart to buy 75% stake in Japanese peer Owndays

Vietnam:

Viet Nam's GDP hits 10-year high of 7.72% in Q2
Vietnam enjoys trade surplus of 710 million USD in six months
Ho Chi Minh City record strong FDI inflows in H1

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,408.02	-0.4%	1.8%	-6.4%	10.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,225.61	0.5%	-2.3%	-9.1%	-22.5%	EGP/USD	18.80	0.2%	19.7%
India	15,799.10	-0.3%	0.6%	-4.7%	-9.0%	INR/USD	78.96	0.2%	6.2%
Kenya	1,600.67	1.4%	1.7%	-4.8%	-15.9%	KES/USD	117.80	0.0%	4.1%
Nigeria	1,886.28	-0.04%	0.4%	-3.7%	9.5%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	11,727.19	0.5%	3.7%	-9.2%	3.5%	SAR/USD	3.75	0.0%	-0.1%
South Africa	61,553.81	-0.4%	2.6%	-5.9%	-8.2%	ZAR/USD	16.24	1.3%	1.8%
Vietnam	1,273.40	-0.001%	3.1%	-4.4%	-17.1%	VND/USD	23,270.00	0.0%	2.1%

MSCI Emerging Markets

MSCI Frontier	520.95	0.0%	1.0%	-5.0%	-21.7%	Brent Crude (\$)	116.26	-1.5%	49.5%
MSCI Frontier 100	1,209.26	0.1%	1.3%	-5.5%	-21.1%	Gold (\$)	1,817.50	-0.2%	-0.6%
MSCI Emerging	1,013.20	-1.6%	0.2%	-6.0%	-17.8%	Copper (\$)	8,401.00	0.4%	-13.6%
MSCI World (USD)	2,574.45	-0.4%	-1.7%	-7.8%	-20.3%	Coffee (\$)	193.32	-1.5%	-2.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	3.44	4.9%	34.9%	20.72	P Z Cussons	10.65	-3.2%	74.6%	4.92
Dangote Sugar	16.30	1.9%	-1.2%	8.31	Ecobank	10.70	-2.7%	28.1%	4.86
FBNH	11.40	1.8%	-0.9%	262.18	Transnational Corporation	1.23	-1.6%	24.2%	5.69
Zenith	21.70	0.2%	-13.2%	275.10	United Capital PLC	12.60	-1.6%	27.3%	31.23
Lafarge Africa	26.95	0.2%	13.7%	189.93	Guaranty	20.50	-1.0%	-21.2%	867.54
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%	0.21	Access	9.25	9.25	0.0%	208.35
Okomu Oil	216.90	216.90	0.0%	2.79	Nascon	11.75	11.70	0.4%	0.40
Seplat Petroleum	1290.00	1300.10	-0.8%	263.02	Nestle	1400.00	1390.00	0.7%	424.34
Airtel Africa	1732.40	1767.00	-2.0%	0.12	Zenith	21.70	21.25	2.1%	275.19
Cadbury	17.25	17.85	-3.4%	2.49	Cap	18.15	17.55	3.4%	28.18

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Agthia Group	5.30	5.2%	2.9%	20.99	PALMS SPORTS	10.62	-6.8%	-13.1%	0.19
Abu Dhabi Ship Building	3.69	2.8%	-7.8%	0.49	Adc Acq Corp Pjsc Shares	11.20	-4.9%	2.4%	3.72
Adnoc Drilling Company Pjsc	3.41	2.4%	0.3%	25.19	Adc Acq Corp Pjsc Warrants	1.62	-3.0%	116.0%	0.29
Alpha Dhabi Holding Pjsc	26.88	2.1%	-1.5%	116.70	Apex Investment P.S.C	4.99	-2.9%	-25.5%	2.66
Abu Dhabi Islamic Bank	7.60	2.0%	10.6%	36.64	Sudatel Telecom	0.34	-2.9%	-2.9%	0.04
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.	2.30	2.30	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	5.70	5.68	0.4%	8.78
National Bank of Fujairah	4.99	4.99	0.0%	0.00	RAK Properties PJSC	0.58	0.56	3.0%	5.76
Sharjah Insurance	1.38	1.38	0.0%	0.00	Palms Sports PJSC	10.62	10.26	3.5%	0.19
National Bank of Umm Al Qaiwain	1.85	1.85	0.0%	0.00	Arkan Building Materials	1.21	1.14	6.1%	1.18

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
GB AUTO	2.67	4.7%	-47.6%	7.94	Cleopatra Hospital Company	4.70	-2.1%	-4.5%	9.29
T M G Holding	7.03	4.0%	-22.5%	7.24	Orascom Construction PLC	52.99	-1.9%	-30.3%	9.25
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.19	3.8%	-8.8%	2.32	Heliopolis Housing	4.92	-1.2%	-26.7%	12.84
MM Group For Industry And International Trade	2.21	3.8%	-67.9%	13.57	Telecom Egypt	13.86	-0.9%	-8.8%	2.32
Alexandria Mineral Oils Company	3.56	3.5%	-2.7%	4.18	Abu Dhabi Islamic Bank- Egypt	11.35	-0.8%	-2.7%	4.18
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	13.86	13.86	0.0%	3.23	Commercial International Bank	37.28	37.28	0.0%	113.12
Sidi Kerir Petrochemicals - SIDPEC	7.23	7.23	0.0%	3.44	Credit Agricole Egypt	5.21	5.21	0.0%	1.33
Oriental Weavers	6.61	6.61	0.0%	5.20	E-finance For Digital and Fin Investments	13.50	13.50	0.0%	22.95
Misr Fertilizers Production Company - Mopco	94.02	94.02	0.0%	6.33	Fawry For Banking Tech And E Payment	3.55	3.55	0.0%	29.15
Heliopolis Housing	4.92	4.92	0.0%	12.84	GB AUTO	2.67	2.67	0.0%	7.94

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ONGC	153.60	2.9%	7.9%	25346.774	HDFC Life Insurance Company	539.50	-4.7%	-16.9%	2333.23
NTPC	141.30	2.0%	13.6%	7546.54	HUL	2233.65	-3.6%	-5.4%	3789.15
Reliance Industries	2576.00	1.9%	8.8%	22682.28	Apollo Hospitals Enterprise Ltd	3704.00	-3.5%	-26.3%	2132.44
Sun Pharma Industries	839.45	1.3%	-0.7%	2480.58	Axis Bank	624.25	-2.8%	-8.0%	8570.98
Coal India	188.40	1.1%	29.0%	3160.21	Tata Consumer products Ltd.	718.40	-2.5%	-3.4%	1272.32
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	273.35	282.35	-3.2%	4363.91	Bajaj Finserv	11089.95	11040.50	0.4%	4354.21
Eicher Motors	2875.10	2994.00	-4.0%	2464.22	Kotak Mahindra Bank	1641.00	1626.00	0.9%	4828.70
Maruti Suzuki India	8492.00	9050.00	-6.2%	5558.22	Axis Bank	624.25	618.25	1.0%	8570.98
Hero Motocorp	2754.00	2968.95	-7.2%	1805.17	Adani Ports And Sez.	676.25	651.95	3.7%	2252.34
Bajaj Auto	3874.60	4250.00	-8.8%	2032.82	Grasim Industries	1326.25	1276.60	3.9%	2069.67

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	98.75	8.8%	13.2%	0.40	Centum Investment Company Plc	9.74	-2.2%	-30.9%	0.11
Safaricom Plc	24.90	6.6%	-34.4%	45.83	Kenya Power & Lighting Limited	1.40	-2.1%	-20.0%	0.65
East African Breweries Limited	127.00	6.3%	-23.0%	69.39	Diamond Trust Bank Limited	51.25	-1.4%	-13.9%	0.65
Nation Media Group	17.10	5.6%	-7.3%	0.09	The Cooperative Bank of Kenya Ltd	10.80	-1.4%	-16.6%	2.96
WPP Scangroup Plc	3.18	4.6%	-23.2%	0.00	Kenya Reinsurance Corporation Ltd	1.94	-1.0%	-15.7%	0.08
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	98.75	108.00	-8.6%	0.40	Kenya Reinsurance Corporation Ltd	1.94	1.92	1.0%	0.08
Bamburi Cement Limited	33.90	40.00	-15.3%	0.14	Kengen Limited	3.39	3.35	1.2%	0.96
Total Kenya Ltd	23.30	27.50	-15.3%	0.00	NCBA Group Plc	23.65	23.00	2.8%	1.53
Standard Chartered Bank Kenya Ltd	125.00	148.75	-16.0%	4.74	Equity Group Holdings Plc	39.90	38.75	3.0%	186.94
NCBA Group Plc	23.65	29.00	-18.4%	1.53	Standard Chartered Bank Kenya Ltd	125.00	121.00	3.3%	4.74

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Baha Investment and Development Co.	16.50	10.0%	-53.3%	23.69	Amana Cooperative Insurance Co.	13.04	-5.2%	-62.1%	22.68
Saudi Advanced Industries Co.	37.05	9.9%	-22.0%	179.40	Dar Alarkan Real Estate Development	10.74	-3.9%	6.8%	284.96
National Gypsum Co.	27.30	9.9%	-39.3%	61.13	Taleem REIT Fund	12.04	-3.7%	-2.1%	2.86
Al-Omran Industrial & Trading	89.90	9.6%	-16.9%	35.85	AlAhli REIT Fund 1	10.58	-3.5%	-7.2%	3.25
Saudi Arabian Cooperative Insurance Co.	23.28	5.8%	6.1%	17.97	Jadwa REIT Saudi Fund	11.90	-3.4%	-20.6%	5.65
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)
Nahdi Medical Co.	160.40	160.40	0.0%	24.02	Naseej International Trading Co	17.30	17.30	0.0%	5.34
Elm Co.	251.40	251.40	0.0%	78.98	Allied Cooperative Insurance Group	14.46	14.46	0.0%	2.26
Saudi Tadawul Group Holding Co.	184.00	184.00	0.0%	90.72	Fawaz Abdulaziz Alhokair Co.	11.38	11.38	0.0%	7.83
ACWA POWER Co.	146.00	146.00	0.0%	47.25	Gulf Union Alahlia	9.36	9.36	0.0%	0.71
The Saudi National Bank	68.30	68.30	0.0%	395.39	National Shipping Co of Saudi Arabia	19.68	19.68	0.0%	9.84

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Prosus NV	106131.00	3.4%	-19.0%	202991.14	Mr Price Group Ltd	18316.00	-4.6%	-8.2%	11113.67
Sasol Ltd	38134.00	3.0%	47.2%	62814.40	MTN Group	13505.00	-3.3%	-20.9%	66990.01
Naspers Ltd	234316.00	1.7%	-5.2%	501873.47	Old Mutual Ltd	1143.00	-2.9%	-12.7%	13596.11
Cie Financiere Richemont SA	17586.00	0.7%	-27.1%	58086.42	Nedbank Group Ltd	21200.00	-2.7%	21.1%	22087.35
British American Tobacco PLC	71400.00	0.7%	21.9%	46068.57	Aspen Pharmacare Holdings Ltd	14285.00	-2.6%	-36.4%	10458.38
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	9009.00	9830.56	-8.4%	4189.83	Sibanye Stillwater	4155.00	4059.00	2.4%	60911.02
Investec PLC	8860.00	9684.15	-8.5%	9840.52	NEPI Rockcastle PLC	8893.00	8605.00	3.3%	9016.19
Bidvest Group Ltd/The	21439.00	23636.00	-9.3%	13560.51	SPAR Group Ltd/The	13869.00	13400.00	3.5%	10665.82
Sasol Ltd	38134.00	43860.00	-13.1%	62814.40	Growthpoint Properties Ltd	1277.00	1212.00	5.4%	5775.11
Exxaro Resources Ltd	20822.00	23998.00	-13.2%	16028.96	Mr Price Group Ltd	18316.00	17323.00	5.7%	11113.67

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Bank for Inv. and Devp	34900.00	3.7%	-5.9%	81742.78	BaoViet Holdings	55000.00	-2.3%	-1.8%	55352.00
Vinamilk	72300.00	2.1%	-14.9%	140334.30	Saigon Beer Alcohol Beverage Corp.	154000.00	-2.0%	4.2%	6052.20
Hoa Phat Group JSC	22750.00	1.1%	-35.2%	459329.33	Vietnam National Petroleum Group	41000.00	-1.9%	-23.9%	17925.20
Vietnam Rubber Group JSC	22750.00	1.1%	-35.2%	459329.33	Vincom Retail	28450.00	-1.4%	-5.5%	31164.13
Petrovietnam Gas	117000.00	0.9%	21.6%	113337.90	Asia Commercial JS Bank	24200.00	-1.2%	-12.3%	47446.52
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn g)
Phu Nhuan Jewelry	129500.00	130421.95	-0.7%	120357.30	Vingroup JSC	73400.00	72000.00	1.9%	104910.62
FPT Corp	90000.00	99083.29	-9.2%	106434.00	Vietcombank	75500.00	72386.80	4.3%	63986.25
Mobile World Inv. Corp	73000.00	80873.83	-9.7%	230256.60	No Va Land Invest	75100.00	72000.00	4.3%	182132.52
Vietjet Aviation	132300.00	149000.00	-11.2%	71561.07	Phat Dat Real Estate Development Corp	52400.00	48200.00	8.7%	91003.08
Petrovietnam Gas	117000.00	134000.00	-12.7%	113337.90	Asia Commercial JS Bank	24200.00	22000.00	10.0%	47446.52

Email: research@fsdhgroup.com • www.fsdhgroup.com

DISCLAIMER

This publication is prepared by FSDH Capital LTD solely for the information of users who are expected to make their own investment decisions without undue reliance on any information or opinions contained herein. The opinions contained in the report should not be interpreted as an offer to sell, or a solicitation of any offer to buy any investment. FSDH Capital LTD may invest substantially in securities of companies using information contained herein and may also perform or seek to perform investment services for companies mentioned herein. Whilst every care has been taken in preparing this document, no responsibility or liability is accepted by any member of the FSDH Capital LTD for actions taken as a result of information provided in this publication.