

Daily Market Report

1 July 2022

JSE

JSE All-Share fell by 2.25% to close at 66,223.31 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 207.65 points, up by 0.34% on Thursday, with Ecobank Transnational Inc and Citab Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index inched up by 0.03% to close at 51,817.59 points on Thursday, as the Oil & Gas, Insurance, Banking sector recorded gains.

EGX

EGX 30 Index was closed on Thursday on account of Revolution Day.

ESG

Casablanca ESG 10 Index dropped by 1.24% to close at 899.03 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.25%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.34%
NSE Nigerian Stock Exchange	▲ 0.03%
EGX Egyptian Stock Exchange	↔ 0.00%
ESG Casablanca Stock Exchange	▼ 1.24%

African Markets

Nigeria: NSE 30 Index inched up by 0.07% and closed at 1,887.62 points on Thursday. FCMB and UBN were the top gainers.

Egypt: EGX 30 Index was closed on Thursday on account of Revolution Day.

Kenya: NSE 20 Index increased by 0.76% and closed at 1,612.89 points on Thursday. East African Breweries and Equity Group Holdings were the top gainers.

South Africa: JSE Top 40 Index fell by 2.35% to close at 60,109.04 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦415.77
INTERBANK RATES	
OPR	13.83 ▼
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.35% to close at 9,374.7 points on Thursday, as losses in the Consumer Discretionary, Health Care, Real Estate, Telecom, Utilities and Basic Materials sectors led shares lower. MSCI UAE declined by 1.07% to close at 431.06 points.

Vietnam: VN-30 Index fell by 1.92% to close at 1,248.92 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.54% to close at 791.36 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.74% to close at 11,523.25 points on Thursday, as losses in the Media & Publishing, Financial Services and Telecoms & IT sectors led shares lower. MSCI Saudi Arabia fell by 2.36% to close at 1,598.71 points.

India: Nifty 50 Index was down by 0.12% to close at 15,780.25 points on Thursday, as losses in the Metals, Auto and Real Estate sectors led shares lower. MSCI India decreased by 0.27% to close at 1,824.28 points.

News

Nigeria:

Manufacturers bleed as forex scarcity hits harder
UK to invest \$1b in banks, telecoms, power sectors
Shell suspends multibillion-dollar assets sale in Nigeria

Kenya:

Inflation rises to 58-month high as goods prices soar
IMF loan third tranche to delay to mid-July
World Bank Extends KSh390 mn Facility for Solar Projects in Kenya

Abu Dhabi:

Abu Dhabi unveils industrial strategy, to invest Dh10b
UAE's Brooge Energy enters renewable energy sector
DP World sells 22.5% stake in India operations

Saudi Arabia:

Saudi Arabian Centres to add \$2.7bn to assets via revaluation
Saudi CMA nods to Arabian Drilling's IPO, listing of APICO, Abdulaziz & Mansour
Saudi authority approves Tibbiyah's 51% acquisition of UAE health company

Egypt:

WB approves \$500 mln loan to support Egypt's food security
Bahrain to raise trade exchange volume with Egypt to \$1 bln next year
Egypt to buy 815K tons of wheat; power interconnection project with KSA underway

South Africa:

SA's May budget deficit at R17.13bn
South Africa trade surplus widens to R28.35bn in May
PPI increased 14.7% y/y in May

India:

Core sector growth surges to 18.1% in May
Centre's fiscal deficit at 12.3% of full year target in May: Report
India's external debt rose to \$620.7 billion last fiscal: RBI data

Vietnam:

HCM City calls for EU investment in nearly 200 projects
Vietnamese, Turkmenistan firms enhance business cooperation
Investors to be able to trade stocks on T+2 settlement cycle

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,374.70	-0.4%	1.5%	0.0%	10.4%	AED/USD	3.67	0.0%	0.0%
Egypt	9,225.61	0.0%	-2.3%	0.0%	-22.5%	EGP/USD	18.80	0.0%	19.7%
India	15,780.25	-0.1%	0.5%	0.0%	-9.1%	INR/USD	78.97	0.0%	6.2%
Kenya	1,612.89	0.8%	2.5%	0.0%	-15.2%	KES/USD	117.90	0.1%	4.2%
Nigeria	1,887.62	0.1%	0.5%	0.0%	9.6%	NGN/USD	415.00	0.0%	0.3%
Saudi Arabia	11,523.25	-1.7%	1.9%	0.0%	1.7%	SAR/USD	3.75	0.0%	-0.1%
South Africa	60,109.04	-2.3%	0.2%	0.0%	-10.4%	ZAR/USD	16.38	0.9%	2.6%
Vietnam	1,248.92	-1.9%	1.1%	0.0%	-18.7%	VND/USD	23,265.00	0.0%	2.1%

MSCI Emerging Markets

MSCI Frontier	517.41	-0.7%	0.3%	0.0%	-22.3%	Brent Crude (\$)	114.81	-1.2%	47.6%
MSCI Frontier 100	1,201.61	-0.6%	0.6%	0.0%	-21.6%	Gold (\$)	1,807.30	-0.6%	-1.2%
MSCI Emerging	1,000.67	-1.2%	-1.0%	0.0%	-18.8%	Copper (\$)	8,258.00	-1.7%	-15.0%
MSCI World (USD)	2,546.19	-1.1%	-2.8%	0.0%	-21.2%	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 ₦)
FCMB	3.46	4.8%	16.1%	7.33	P Z Cussons	9.60	-9.9%	57.4%	10.57
UBN	6.15	4.2%	1.7%	15.23	Lafarge Africa	26.40	-2.0%	11.4%	28.53
FBNH	11.60	1.8%	0.9%	424.13	Julius Berger	26.50	-1.5%	18.6%	35.73
Flour Mills	32.50	1.6%	14.6%	9.26	Sterling	1.52	-1.3%	1.3%	16.76
Wema	3.19	1.3%	303.8%	21.56	Ecobank	10.60	-0.9%	26.9%	6.84
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%	0.19	Nascon	11.75	11.70	0.4%	0.07
Okomu Oil	216.90	216.90	0.0%	7.70	Access	9.25	9.20	0.5%	79.82
Seplat Petroleum	1300.00	1300.10	0.0%	140.73	Nestle	1400.00	1390.00	0.7%	4.31
Airtel Africa	1732.20	1767.00	-2.0%	336.78	Zenith	21.70	21.25	2.1%	305.39
Cadbury	17.25	17.85	-3.4%	0.82	Cap	18.15	17.55	3.4%	5.55

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Invictus Investment Company PLC	5.30	31.5%	31.5%	84.18	Methaq Takaful Ins.	0.72	-3.6%	-11.4%	0.30
Waha Capital	1.58	11.3%	31.7%	5.26	ARAM GROUP	2.70	-3.6%	-12.9%	0.00
Q HOLDING PSC	4.20	10.5%	-4.8%	27.35	Abu Dhabi National Hotels	3.80	-3.3%	0.5%	0.76
GHITHA HOLDING P.J.S.C.	79.90	9.5%	190.5%	47.07	Emirates Telecom	26.10	-2.8%	-17.7%	147.62
RAK Properties PJSC	0.62	8.0%	-19.4%	11.57	Manazel PJSC	0.37	-2.1%	-29.4%	2.72
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%	1.19
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	1.87
Sharjah Insurance	1.38	1.38	0.0%	0.00	Gulf Pharmaceutical Ind.	1.29	1.20	7.5%	0.05
National Bank of Umm Al Qaiwain	1.85	1.85	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£)
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

*Market closed on 30/6

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Axis Bank	634.90	1.5%	-6.4%	6716.149	Cipla	914.00	-3.6%	-3.2%	2243.60
State Bank Of India	465.60	1.4%	1.1%	7880.39	Eicher Motors	2784.05	-3.6%	7.4%	2627.21
Divi's Laboratories Limited	3630.00	1.3%	-22.4%	2077.87	Bharat Petroleum	307.60	-2.8%	-20.2%	1427.41
Britannia Inds.	3441.00	1.1%	-4.6%	1648.18	Jsw Steel	561.20	-2.6%	-14.4%	3200.92
HDFC Life Insurance Company Ltd	547.00	1.1%	-15.8%	3424.57	Shree Cement limited	18900.00	-2.5%	-30.0%	1043.61
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	272.15	282.35	-3.6%	5267.98	Bajaj Finserv	10923.00	10909.00	0.1%	3837.36
Maruti Suzuki India	8438.10	9050.00	-6.8%	9664.74	Kotak Mahindra Bank	1658.00	1626.00	2.0%	6619.19
Eicher Motors	2784.05	2994.00	-7.0%	2627.21	Axis Bank	634.90	618.25	2.7%	6716.15
Hero Motocorp	2730.00	2968.95	-8.0%	1762.17	Adani Ports And Sez.	669.60	651.95	2.7%	2367.61
Reliance Industries	2589.00	2856.15	-9.4%	27691.74	Hcl Technologies	971.25	944.05	2.9%	3659.67

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	137.25	8.1%	-16.8%	0.92	WPP Scangroup Plc	3.08	-3.1%	-25.6%	0.00
Equity Group Holdings Plc	43.00	7.8%	-18.5%	43.75	Diamond Trust Bank Limited	49.95	-2.5%	-16.1%	63.26
KCB Group Plc	38.65	2.9%	-15.0%	2.62	British American Tobacco Kenya Ltd	407.75	-2.0%	-7.6%	62.63
Kenya Reinsurance Corporation Ltd	1.99	2.6%	-13.5%	0.02	Nairobi Securities Exchange Plc	7.12	-0.8%	-5.3%	0.05
Kenya Power & Lighting Limited	1.43	2.1%	-18.3%	0.26	Absa Bank Kenya	10.45	-0.5%	-11.8%	0.96
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%	0.00	Kengen Limited	3.38	3.35	0.9%	4.29
Bamburi Cement Limited	34.35	40.00	-14.1%	0.15	British American Tobacco Kenya Ltd	407.75	400.00	1.9%	62.63
Total Kenya Ltd	23.45	27.50	-14.7%	0.05	NCBA Group Plc	23.60	23.00	2.6%	0.51
Standard Chartered Bank Kenya Ltd	124.75	148.75	-16.1%	4.55	Diamond Trust Bank Limited	49.95	48.50	3.0%	63.26
NCBA Group Plc	23.60	29.00	-18.6%	0.51	Standard Chartered Bank Kenya Ltd	124.75	121.00	3.1%	4.55

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Qassim Cement Co.	79.20	4.9%	4.6%	6.99	Amana Cooperative Insurance Co.	11.74	-10.0%	-65.9%	104.25
Yanbu Cement Co.	33.95	3.5%	-6.2%	6.99	Etihad Atheeb Telecom Co.	41.60	-8.6%	41.5%	19.93
Eastern Province Cement Co.	46.00	3.4%	4.7%	1.62	Saudi Advanced Industries Co.	34.75	-6.2%	-26.8%	172.04
Saudi Tadawul Group Holding Co.	189.00	2.7%	50.2%	96.69	Al-Omran Industrial & Trading Co	85.00	-5.5%	-21.4%	15.12
Al Hammadi Company for Development and Investment	36.50	2.5%	-9.4%	10.25	United Cooperative Assurance Co.	27.45	-4.7%	-19.1%	3.16
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.	161.80	161.80	0.0%	56.80	Naseej International Trading Co	17.00	17.00	0.0%	7.98
Elm Co.	255.00	255.00	0.0%	121.22	Alkhabeer REIT Fund	8.09	8.09	0.0%	1.09
Saudi Tadawul Group Holding Co.	189.00	189.00	0.0%	96.69	Allied Cooperative Insurance Group	14.18	14.18	0.0%	3.86
ACWA POWER Co.	149.40	149.40	0.0%	119.57	Gulf General Coop Insurance Co.	8.94	8.94	0.0%	5.18
The Saudi National Bank	65.90	65.90	0.0%	424.68	Gulf Union Alahlia	9.19	9.19	0.0%	0.84

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings Ltd	18114.00	1.2%	-19.5%	82719.41	Anglo American PLC	58049.00	-5.1%	-10.0%	93539.00
Naspers Ltd	236772.00	1.0%	-4.2%	453556.65	Sanlam Ltd	5287.00	-4.9%	-10.9%	39957.22
Northam Platinum Ltd	17129.00	0.6%	-18.2%	27377.16	Exxaro Resources	19818.00	-4.8%	29.6%	34380.13
					Discovery Ltd	12810.00	-4.5%	-10.8%	26631.39
					Standard Bank Group Ltd	15517.00	-3.9%	10.8%	67102.91
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 PLC	8740.00	9684.15	-9.7%	20376.73	Sibanye Stillwater	4067.00	4049.00	0.4%	46485.42
Investec Ltd	8787.00	9830.56	-10.6%	16968.03	Sanlam Ltd	5287.00	5229.00	1.1%	39957.22
Bidvest Group Ltd/The	20959.00	23636.00	-11.3%	21489.93	Growthpoint Properties Ltd	1235.00	1212.00	1.9%	16562.90
Bid Corp Ltd	30681.00	36098.00	-15.0%	35653.62	Mr Price Group Ltd	17737.00	17323.00	2.4%	18218.70
MultiChoice Group	11581.00	13650.00	-15.2%	13472.91	NEPI Rockcastle PLC	8709.00	8501.00	2.4%	16303.81

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	154600.00	0.4%	4.6%	3756.78	Sai Gon Thuong Tin Commercial	21500.00	-4.9%	-31.7%	403980.70
Vincom Retail	28550.00	0.4%	-5.1%	45822.75	Saigon Securities Inc	18800.00	-4.8%	-59.2%	248951.48
Vingroup JSC	73500.00	0.1%	-22.7%	138091.80	BaoViet Holdings	52500.00	-4.5%	-6.3%	72796.50
					FPT Corp	86200.00	-4.2%	11.2%	129860.30
					Bank for Inv. and Devp	33500.00	-4.0%	-9.7%	50196.40
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	128500.00	130421.95	-1.5%	90052.80	Vingroup JSC	73500.00	72000.00	2.1%	138091.80
Mobile World Inv. Corp	71500.00	80873.83	-11.6%	171678.65	Vietcombank	74800.00	72386.80	3.3%	50744.32
Vietjet Aviation	130000.00	149000.00	-12.8%	72969.00	No Va Land Invest	74500.00	72000.00	3.5%	119013.75
FPT Corp	86200.00	99083.29	-13.0%	129860.30	Phat Dat Real Estate Development Corp	51800.00	48200.00	7.5%	74312.28
Petrovietnam Gas	115500.00	134000.00	-13.8%	116447.10	Vinhomes	62100.00	57520.56	8.0%	154020.42

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