

# Daily Market Report

## 13 July 2022

### JSE

JSE All-Share inched down by 0.09% to close at 67,163.69 points on Tuesday, as the Resources sector recorded losses.

### BRVM

BRVM Composite Index closed at 206.82 points, down by 0.27% on Tuesday, with Bank of Africa - Senegal and Sode Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index was closed on Tuesday on account of Eid al-Adha.

### EGX

EGX 30 Index was closed on Tuesday on account of Eid al-Adha.

### ESG

Casablanca ESG 10 Index increased by 0.35% to close at 883.54 points on Tuesday.

### Capital Markets

#### JSE

Johannesburg Stock Exchange ▼ 0.09%

#### BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.27%

#### NSE

Nigerian Stock Exchange ↔ 0.00%

#### EGX

Egyptian Stock Exchange ↔ 0.00%

#### ESG

Casablanca Stock Exchange ▲ 0.35%

### African Markets

**Nigeria:** NSE 30 Index was closed on Tuesday on account of Eid al-Adha.

**Egypt:** EGX 30 Index was closed on Tuesday on account of Eid al-Adha.

**Kenya:** NSE 20 Index decreased by 0.36% and closed at 1,685.90 points on Tuesday. Nairobi Securities Exchange and The Cooperative Bank of Kenya were the top losers.

**South Africa:** JSE Top 40 Index inched down by 0.07% to close at 60,964.89 points on Tuesday, as the Resources sector recorded losses.

### Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.83
<b>INTERBANK RATES</b>	
OPR	13.83 ▼
Overnight	14.00 ↔

### Other Emerging Markets

**Abu Dhabi:** ADX Index was up by 0.10% to close at 9,231.79 points on Tuesday, as gains in the Health Care, Financials, Real Estate, and Energy sectors led shares higher. MSCI UAE increased by 0.47% to close at 421.12 points.

**Vietnam:** VN-30 Index increased by 0.86% to close at 1,219.44 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.76% to close at 773.6 points.

**Saudi Arabia:** Tadawul All Share Index was closed on Tuesday on account of Eid al-Adha.

**India:** Nifty 50 Index decreased by 0.97% to close at 16,058.30 points on Tuesday, as losses in the IT, Technology and Metals sectors led shares lower. MSCI India decreased by 0.79% to close at 1,868.71 points.

### News

#### Nigeria:

Oil falls below \$100, Nigeria's production hit 1.158mb/d  
Manufacturing records second contraction in two months – Report  
NNPC blocks Exxon Mobil's asset sale to Seplat

#### Kenya:

Current account widens over oil, food import bill  
AfDB Approves KSh10.9 bn for Kenya's Procurement Processes  
Kenya pursues waivers of IMF loan conditions

#### Abu Dhabi:

No relief from oil market squeeze in OPEC outlook  
DP World's Imperial acquires controlling stake in Nigeria's Africa FMCG  
Emirates and Air Canada form strategic partnership & plan codeshare alliance

#### Saudi Arabia:

Saudi Arabia's Q1 current account hits 8-year high thanks to oil sales  
Saudi Aramco Plans Mega Expansion Drive At Namaat Industrial Complex  
Advanced inks \$1.6bn finance deal to build Saudi petchem plants

#### Egypt:

New budget allocates EGP356 bln for subsidisation; EGP400 bln for wages: FM  
Egypt eyes investment in 3 basic sectors in South Sudan  
Egypt in talks with UAE over bi-fuel pickup cars manufacturing

#### South Africa:

Transnet secures R25.5bn credit facility, with Deutsche Bank as lead bookrunner  
Gold Fields sweetens Yamana deal to win over investors  
Offshore investors net sellers of SA stocks, bonds

#### India:

HCL Tech Q1 Net profit rises 2% to Rs 3,281 crore, revenue grows 17%  
ArcelorMittal Nippon Steel to invest Rs 273 crore in Hazira  
Industrial production grows at a year-high of 19.6% in May

#### Vietnam:

HCM City to implement transport projects around Tan Son Nhat airport  
Hanoi launches price stabilisation programme for essential goods in 2022  
HCM City approves 50% port infrastructure fee cut

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,231.79	0.1%	0.1%	-1.5%	8.8%	AED/USD	3.67	0.0%	0.0%
Egypt	8,764.25	0.0%	0.0%	-5.0%	-26.4%	EGP/USD	18.88	0.1%	20.2%
India	16,058.30	-1.0%	-1.0%	1.8%	-7.5%	INR/USD	79.60	0.2%	7.1%
Kenya	1,685.90	-0.4%	-0.4%	4.5%	-11.4%	KES/USD	118.15	0.0%	4.4%
Nigeria	1,878.56	0.0%	0.0%	-0.5%	9.1%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,416.54	0.0%	0.0%	-0.9%	0.7%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,964.89	-0.1%	-1.8%	1.4%	-9.1%	ZAR/USD	17.00	-0.3%	6.5%
Vietnam	1,219.44	0.9%	-1.0%	-2.4%	-20.6%	VND/USD	23,394.00	0.2%	2.7%

## MSCI Emerging Markets

MSCI Frontier	513.96	0.2%	-0.4%	-0.7%	-22.8%	Brent Crude (\$)	99.49	-7.1%	27.9%
MSCI Frontier 100	1,201.01	0.3%	-0.3%	-0.05%	-21.7%	Gold (\$)	1,724.80	-0.4%	-5.7%
MSCI Emerging	967.31	-1.4%	-3.2%	-3.3%	-21.5%	Copper (\$)	7,354.00	-3.0%	-24.3%
MSCI World (USD)	2,554.19	-0.7%	-1.9%	0.3%	-21.0%	Coffee (\$)	190.78	-2.6%	30.5%

## STOCKS

### Nigeria\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBA	7.55	1.3%	-5.6%	107.79	Transnational Corporation	1.24	-3.1%	25.3%	5.40
Zenith	22.00	0.7%	-12.0%	183.62	Access	9.50	-2.1%	4.4%	60.36
Sterling	1.55	0.6%	3.3%	11.16	United Capital PLC	12.55	-1.2%	26.8%	25.82
					Lafarge Africa	26.00	-0.8%	9.7%	41.18
					Fidelity	3.19	-0.3%	25.1%	10.17
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%	0.48	Cap	17.00	17.00	0.0%	0.99
Seplat Petroleum	1300.50	1300.50	0.0%	2.92	Nascon	11.00	11.00	0.0%	0.35
Okomu Oil	216.90	216.90	0.0%	2.46	Nestle	1400.00	1390.00	0.7%	6.73
Airtel Africa	1732.20	1767.00	-2.0%	528.22	Access	9.50	9.20	3.3%	60.29
BUA Cement	71.90	74.50	-3.5%	0.47	Zenith	22.00	21.25	3.5%	183.87

\*Market closed on 12/7

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement	0.54	8.7%	-23.1%	0.03	Ghitha Holding P.J.S.C.	79.00	-5.6%	187.3%	46.56
Manazel PJSC	0.40	7.8%	-23.7%	9.59	Apex Investment P.S.C	5.03	-2.1%	-24.9%	0.47
Sudatel Telecom	0.35	6.1%	0.0%	0.10	Fertiglobe Plc	4.45	-2.0%	26.4%	16.05
Abu Dhabi National for Building Materials	0.19	5.7%	-25.7%	0.00	Adc Acq. Corp. Pjsc Warrants	1.58	-1.9%	110.7%	0.01
Eshraq Investments	0.35	3.6%	-2.2%	5.52	Sharjah Islamic Bank	1.67	-1.8%	-14.4%	1.58
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	Palms Sports PJSC	9.84	9.80	0.4%	4.46
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	5.80	5.67	2.3%	0.42
Sharjah Insurance	1.38	1.38	0.0%	0.00	Waha Capital	1.41	1.38	2.4%	0.60
National Bank of Umm Al Qaiwain	1.85	1.85	0.0%	0.00	Arkan Building Materials	1.20	1.14	5.3%	1.27

## Egypt\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Credit Agricole Egypt	4.44	5.2%	-47.3%	4.06	Medinet Nasr Housing	2.60	-5.1%	-11.0%	121.57
Palm Hills Development Company	1.19	4.3%	-40.1%	4.59	GB AUTO	2.62	-1.1%	-48.6%	10.94
MM Group For Industry And International Trade	2.05	2.5%	-70.2%	14.30	Heliopolis Housing	4.89	-1.0%	-27.1%	11.40
Citadel Capital - Common Shares	1.03	2.5%	-14.6%	3.93	Orascom Development Egypt	3.50	-0.9%	-25.8%	3.11
Commercial International Bank(Egypt)	35.60	2.3%	-32.8%	72.17	Housing & Development Bank	32.37	-0.1%	-72.0%	7.88
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	13.22	13.22	0.0%	0.26	Cairo For Investment And RealEstate Dev	10.30	10.30	0.0%	5.62
Sidi Kerir Petrochemicals - SIDPEC	6.94	6.94	0.0%	1.28	Citadel Capital - Common Shares	1.03	1.03	0.0%	3.93
Oriental Weavers	6.45	6.45	0.0%	3.11	Commercial International Bank	35.60	35.60	0.0%	72.17
Misr Fertilizers Production Company - Mopco	94.51	94.51	0.0%	3.65	Credit Agricole Egypt	4.44	4.44	0.0%	4.06
Heliopolis Housing	4.89	4.89	0.0%	11.40	Eastern Company	10.00	10.00	0.0%	2.67

\*Market closed on 12/7

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	146.85	1.4%	18.0%	2812.412	Eicher Motors	2945.15	-3.3%	13.6%	3197.74
Coal India	193.80	0.2%	32.7%	1346.82	Hindalco Industries	346.30	-2.8%	-27.2%	5867.04
Shree Cement limited	19890.05	0.2%	-26.3%	527.20	Infosys	1437.05	-2.5%	-23.9%	6832.94
Bharti Airtel	661.55	0.2%	-3.3%	4921.61	Bharat Petroleum	308.55	-2.3%	-20.0%	1662.83
Bajaj Finance	5869.00	0.1%	-15.9%	5722.26	Grasim Industries	1378.00	-2.0%	-15.1%	440.81
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Hero Motocorp	2866.80	2954.45	-3.0%	1213.01	Hcl Technologies	926.10	924.40	0.2%	4960.93
Eicher Motors	2945.15	3053.05	-3.5%	3197.74	Wipro	408.50	402.05	1.6%	2009.56
Mahindra & Mahindra	1147.95	1194.90	-3.9%	2830.53	Tata Consultancy Svs.	3084.50	3023.85	2.0%	11605.12
Bajaj Auto	3839.10	4050.00	-5.2%	941.14	Infosys	1437.05	1367.15	5.1%	6832.94
Maruti Suzuki India	8399.00	9050.00	-7.2%	3576.90	Bharat Petroleum	308.55	293.35	5.2%	1662.83

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	29.50	4.6%	-22.3%	288.55	Nairobi Securities Exchange Plc	7.00	-6.4%	-6.9%	0.84
WPP Scangroup Plc	3.27	1.6%	-21.0%	0.12	The Cooperative Bank of Kenya Ltd	10.90	-5.2%	-15.8%	7.19
British American Tobacco Kenya Ltd	420.00	1.3%	-4.9%	1.39	Nation Media Group	19.00	-1.8%	3.0%	0.26
Centum Investment Company Plc	10.00	1.2%	-29.1%	0.15	Kenya Reinsurance Corporation Ltd	2.03	-1.5%	-11.7%	0.04
Stanbic Holdings	100.00	1.0%	14.6%	0.01	Kenya Power & Lighting Limited	1.43	-1.4%	-18.3%	0.40
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	100.00	108.00	-7.4%	0.01	NCBA Group Plc	23.95	23.00	4.1%	1.13
Standard Chartered Bank Kenya Ltd	133.00	148.75	-10.6%	0.77	Diamond Trust Bank Limited	50.00	48.00	4.2%	0.82
Total Kenya Ltd	24.50	27.50	-10.9%	0.00	Kengen Limited	3.50	3.35	4.5%	0.80
Bamburi Cement Limited	35.40	40.00	-11.5%	1.55	British American Tobacco Kenya Ltd	420.00	400.00	5.0%	1.39
Absa Bank Kenya	11.30	12.95	-12.7%	0.70	Kenya Reinsurance Corporation Ltd	2.03	1.92	5.7%	0.04

## Saudi Arabia\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tanmiah Food Co.	73.30	6.9%	-10.7%	34.10	Saudi Ceramic Co.	38.95	-4.4%	-29.3%	20.14
Saudi Ground Services Co.	27.20	5.4%	-8.0%	14.86	Arabian Centres Co.	19.56	-3.9%	-13.4%	24.76
Al Hassan Ghazi Ibrahim Shaker Co.	17.02	5.3%	-23.2%	29.86	Eastern Province Cement Co.	43.50	-3.8%	-1.0%	2.10
Saudi Investment Bank	19.52	4.8%	-0.2%	12.54	Advanced Petrochemical Co.	47.60	-3.6%	-32.4%	43.89
Bank Aljazira	21.82	4.7%	13.1%	121.03	Red Sea International Co.	13.36	-3.2%	-36.7%	2.90
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.	162.80	162.80	0.0%	87.24	Al Kathiri Holding	42.55	42.55	0.0%	1.21
Elm Co.	260.00	260.00	0.0%	45.31	Naseej International Trading Co	16.32	16.32	0.0%	2.25
Saudi Tadawul Group Holding Co.	192.80	192.80	0.0%	45.97	Allied Cooperative Insurance Group	14.60	14.60	0.0%	1.62
ACWA POWER Co.	147.60	147.60	0.0%	52.39	Anaam International Holding Group	20.10	20.10	0.0%	8.90
The Saudi National Bank	67.40	67.40	0.0%	272.44	Gulf General Coop Insurance Co.	8.78	8.78	0.0%	3.42

\*Market closed on 12/7

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Absa Group Ltd	15900.00	2.5%	4.2%	29520.34	Anglo American Platinum Ltd	136009.00	-5.9%	-22.7%	26657.22
Nedbank Group Ltd	20829.00	1.6%	19.0%	15768.64	Northam Platinum	16673.00	-5.4%	-20.4%	17481.66
Standard Bank Group Ltd	15395.00	1.5%	10.0%	37349.15	Impala Platinum Holdings Ltd	17101.00	-5.0%	-24.0%	47961.26
Mondi PLC	30006.00	1.3%	-24.1%	15699.29	AngloGold Ashanti	24720.00	-2.1%	-24.8%	23014.99
Sanlam Ltd	5376.00	1.2%	-9.4%	18037.96	Woolworths Holdings Ltd	5381.00	-1.9%	3.8%	19421.08
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	21505.00	23636.00	-9.0%	19961.72	Mr Price Group Ltd	17435.00	17139.00	1.7%	16847.68
MultiChoice Group	12154.00	13650.00	-11.0%	7522.62	SPAR Group Ltd/The	13646.00	13400.00	1.8%	9052.47
Bid Corp Ltd	31603.00	36098.00	-12.5%	18368.58	Northam Platinum	16673.00	16059.00	3.8%	17481.66
Naspers Ltd	263013.00	301297.00	-12.7%	210116.61	Vodacom Group Ltd	13454.00	12762.00	5.4%	12737.25
Investec PLC	8402.00	9684.15	-13.2%	8044.60	Sanlam Ltd	5376.00	5065.00	6.1%	18037.96

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Bank for Inv. and Devp	36400.00	5.5%	-1.9%	60824.40	Vietjet Aviation	125500.00	-1.5%	-2.2%	80872.20
Petrovietnam Gas	99000.00	4.3%	5.7%	77160.60	Saigon Beer Alcohol Beverage Corp.	153600.00	-1.0%	4.0%	3978.24
PetroVietnam Power Corp	12950.00	3.6%	-26.0%	103489.93	Vinhomes	60200.00	-0.5%	-24.4%	216882.54
Tien Phong Commercial Joint Stock Bank	26700.00	2.7%	-35.0%	16807.65	Masan Group Corp	102000.00	-0.5%	-27.9%	29284.20
Military Commercial Bank	25050.00	2.7%	-13.3%	146687.79	Mobile World Inv. Corp	64400.00	-0.2%	-4.6%	103445.72
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	116800.00	130421.95	-10.4%	43180.96	No Va Land Invest	73400.00	72000.00	1.9%	67329.82
Saigon Beer Alcohol Beverage Corp.	153600.00	181400.00	-15.3%	3978.24	Vietcombank	71900.00	68900.00	4.4%	58346.85
FPT Corp	83500.00	99083.29	-15.7%	50333.80	Vincom Retail	26200.00	25100.00	4.4%	28495.12
Vietjet Aviation	125500.00	149000.00	-15.8%	80872.20	Vinhomes	60200.00	57520.56	4.7%	216882.54
Vinamilk	73300.00	87859.93	-16.6%	71548.13	Vietnam Prosperity	27750.00	26500.00	4.7%	232633.80

Email: [research@fsdhgroup.com](mailto:research@fsdhgroup.com) • [www.fsdhgroup.com](http://www.fsdhgroup.com)

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